FormFlow Filler User's Guide

FormFlow Filler User's Guide

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Table of Contents

3 Getting Started with FormFlow Filler

4 Filling Forms

5 Working with Data

6 Sending and Receiving Forms

1

Overview

This chapter describes how to use the FormFlow™ Filler User’s Guide. It covers the following topics:

- finding information in this manual
- recognizing conventions used in this manual
- getting help.

Using this Manual

This *Filler User's Guide* contains detailed information on using FormFlow 2.1x Filler in a Windows 3.1x or Windows 95 environment.

Installing the FormFlow Filler Pack

This chapter outlines how to install and set up the FormFlow Filler Pack in Windows environments on standalone and networked computers. This chapter also includes a list of common file types associated with FormFlow applications.

Getting Started with FormFlow Filler

This chapter explains the terminology used to describe the Filler user interface, and the different forms of help available to you. You learn how to work with—and even customize—the screen components.

Filling Forms

This chapter describes the methods you can use to fill fields, such as typing text, selecting from a list, or inserting a text file or OLE object. You learn how to move between fields, to spell check your text, and to sign a form electronically.

Working with Data

This chapter describes how to open an existing database or create a new one, to select an existing index or add a new one. You learn how to add, update and delete records, to commit or rollback changes to a SQL table, and to search for specific records in a database.

Sending and Receiving Forms

This chapter describes how to send or package a form, how to unpack, update and return form packages you receive, and how to route and update workflow tasks.

Printing Forms

This chapter describes how to select a printer, and how to print a form on either blank paper or pre-printed stationery.

Recognizing Conventions in this Manual

Filler procedures and usage examples appear in numbered steps in this main column of each page. An arrowed "To" heading marks the start of each procedure.

➤To follow a procedure

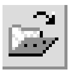
1. In the chapter section, read the introductory text.

2. Look for the arrow that identifies the start of the procedure.

3. Follow the numbered steps.

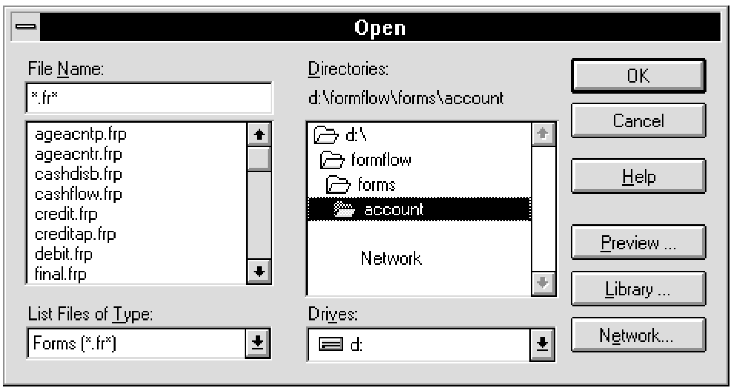
The numbered steps in a procedure describe only the menu method of performing it. If there is also a quick key or tool button that you can use to do the same thing, it appears in the left margin.

Illustrations of dialogs appear in the main text column. For example:



Quick key: CTRL + O

1. On the File menu, click **Open**. The Open dialog appears.



Typographical Conventions

Special fonts are used for emphasis, as described in the following table.

Description	Example
Commands on a menu and field names on a dialog appear in boldface.	On the File menu, click **Open.** Click in the **List Files of Type** field, then click **Forms (*.fr*)**.
DOS paths and file names appear in small caps.	A dBASE index on the field CustomerNo would be named CUSTOMER.NDX.

Description	Example
Keycap names appear in small caps, with an initial regular cap.	Press ENTER. Hold down the SHIFT key and press TAB.
Text that you should type in a field appears in a sans serif font.	In the **Description** field, type: Weekly Expense Report
References to titles of FormFlow manuals appear in italics.	For more information, see Chapter 5 in the *Getting Started* manual.

Getting Help

In addition to this manual, there are a number of resources available to help answer your questions as you work with FormFlow.

Using FormFlow Online Help

See “Using Help” on page 3-11.

You can press F1 for help on your current task, or, to display the online help contents, click **Filler Help** on the Help menu. The available help topics are described in the following table.

Help title	Covers these topics
Menus and Commands	Provides help on each Filler menu and command.
How To	Provides step-by-step instructions on Filler tasks.
Troubleshooting	Suggests possible solutions to situations that may arise when using Filler.
Using Help	Provides information on how to use the FormFlow help system.

Contacting Your VAR or Onsite Developer

If you cannot find the answer to your question in this manual or in the online help, take it to the person who designed the form or form application you are working with, or who is currently designated to provide you with support. This could be any of the following:

- your supervisor
- the onsite FormFlow developer
- the Value Added Reseller (VAR) who provides FormFlow to your company.

2

Installing the FormFlow Filler Pack

This chapter explains how to install the FormFlow™ Filler Pack. It covers:

- preparing for installation
- installing Filler on a standalone computer
- installing Filler on a network server
- customizing your installation
- understanding FormFlow file types.

Preparing for Installation

Checking Your FormFlow Package

The FormFlow Filler Pack contains the following items.

- FormFlow Filler Pack CD-ROM and disk pack.
- *FormFlow Filler User's Guide*
- License agreement
- Registration card.

If any item is missing from your FormFlow package, check with the person from whom you purchased FormFlow.

Minimum and Recommended System Configurations

Minimum and recommended configurations for systems on which FormFlow runs are shown in the following table. Check that your system meets at least the minimum configuration requirements before you install FormFlow.

Equipment	Minimum	Recommended
Computer	486/33	486/66 or Pentium
Computer memory	640K conventional memory, 4 MB extended memory	640K conventional memory, 8 MB or more extended memory
Graphics display	VGA	SVGA or higher resolution
Hard disk space	Minimum installation: 15 MB, plus 1 MB free on C:\ for temporary files, additional free space for data files	Full installation: 20 MB, plus 1 MB free on C:\ for temporary files, additional free space for data files
Printer	Any supported by Windows	Laser printer
Mouse	Any supported by Windows	Any supported by Windows
MS-DOS	3.1	6.0 or 6.2
Operating system	Windows 3.1	Windows 3.1, 3.11 or Windows 95

Reviewing the Installation Checklist

Before you install FormFlow, review the following checklist to make sure your installation is successful.

If you are running:

- **Windows 3.1** – all of the following notes will apply
- **Windows 3.11** – use VSHARE.386 instead of SHARE.EXE
- **Windows 95** – you do not need to run SHARE.EXE or a disk-caching program such as SMARTDrive.

Reviewing the README File

Take a few minutes to review the README file for FormFlow. This file contains updated information that was not available when the manuals went to press.

Once you install FormFlow, the FormFlow README file should appear as an icon in your FormFlow group. Double click to open the file. If the README icon does not appear, check your FormFlow media for this file. If your package contains a CD-ROM, you can find the README file in the \DISK1 directory on your CD. If your package contains a disk set, you can find the README file on disk #1.

Loading SHARE.EXE

If you are running Windows 3.1, FormFlow requires that you have SHARE running while installing or using FormFlow. SHARE is a DOS program that provides file sharing and locking capabilities. Running SHARE prevents a file or database record from being edited by two applications at the same time, which might result in data loss.

If you prefer, you can add SHARE to your AUTOEXEC.BAT file so that it loads at start-up. For example, add the line C:\DOS\SHARE.EXE.

Load SHARE at the DOS prompt, or to load SHARE when you start your computer, add the following line to your CONFIG.SYS:

```
INSTALL=C:\DOS\SHARE.EXE
```

Note: Some programs may not work properly with SHARE running. If you experience problems working with a program after loading SHARE, check the program's documentation.

Loading SMARTDrive

You can load SMARTDrive or another caching program automatically in your AUTOEXEC.BAT file. For more information about SMARTDrive, see your DOS or Windows manual.

SMARTDrive is a disk-caching program provided with both DOS and Windows. If you do not currently run SMARTDrive or another disk-caching program, you should load this program before installing FormFlow. Running SMARTDrive can dramatically decrease the time it takes to install FormFlow, and can speed up other FormFlow operations.

Closing All Programs

Before installing FormFlow, close all open Windows applications or any other programs that may be running (including TSR programs), other than Program Manager. This reduces conflicts and frees system memory for the installation.

Quick keys: CTRL + ESC

If you are running Windows 3.1, check the Windows Task Manager and close any programs running in the background. If you are running Windows 95, any open programs appear as buttons on the Windows Taskbar.

Checking for Sufficient Disk Space

Using disk compression increases the capacity of your hard disk drive. Although the typical compression ratio is 2:1, the amount of free disk space reported is only an estimate and often gives the appearance of more free disk space than is actually the case.

The amount of free disk space depends on the types of files compressed on your hard drive, as different files compress to different degrees. For example, executable files (.EXE) cannot be compressed substantially no matter what compression ratio is used, whereas text files can be compressed significantly. Therefore, to make sure your installation is successful, allow for several megabytes of uncompressed hard disk space above what the installation requires.

Note: In addition to the space required for the installation, you will require 2 MB of uncompressed hard disk space for temporary files installed during the installation. This additional space is required only during the installation, and any temporary files created are removed after the installation is complete.

Installing Filler on a Standalone Computer

What The Installation Program Does

See “Reviewing the Installation Checklist” on page 2-3.

The installation program:

- creates a directory in the location you specify on your hard drive
- copies the FormFlow files you select to the new directory on your hard drive
- sets up default locations for your initialization and preferences files (adds the lines, DFConfigPath= and PrefsPath=, to your WIN.INI file, and assigns them the path you specify in this program for the FormFlow program files).

Check the README file after you have completed the installation.

➤To install FormFlow onto a standalone computer

1. Start Windows. Insert the Filler Pack CD-ROM into your CD-ROM drive, or Disk 1 of the disk set into your disk drive.

2. On the Program Manager File menu, click **Run**.

3. In the Run dialog, type:

   D:\SETUP

   then click **OK**. If the CD-ROM or disk drive you are using has a letter other than D, substitute that letter for D. The installation welcome dialog appears.

4. Click **Continue** to proceed with the installation. The installation scenarios dialog appears. To cancel the installation and return to Windows, click **Exit Setup**.

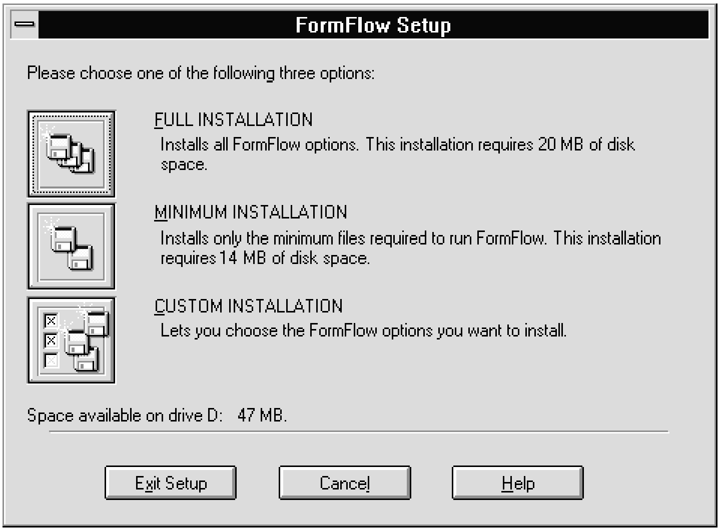
5. Click **Local FormFlow with local Windows**.

6. Click **Continue**. The personal information dialog appears. Type your name and organization.

7. Click **Continue**, then click **Continue** again to confirm your personal information. The destination directory dialog appears.

8. Do one of the following:
   - To accept the default directory, click **OK**. If you have a previously installed version of FormFlow, the installation detects this and displays your current FormFlow directory. Accepting the default directory will replace your existing version.
   - To install to a different directory, click **Browse** and use the Select Directory dialog to choose another destination. If you have a previously installed version of FormFlow in the default directory, installing to a different destination installs a new version separately.

9. The following dialog appears.



10. Click the icon beside the option you want, then follow the instructions on the screen. Options are described in the following sections.

Choosing a Full Installation

A full installation requires approximately 20 MB of disk space on your hard drive. See "Checking for Sufficient Disk Space" on page 2-4.

A full installation installs all FormFlow options. These include:

- Filler program files
- database support
- mail system support for a variety of popular mail systems.

See "Installation Options" on page 2-25.

➤To do a full installation

1. Click the full installation button. Two dialogs appear prompting for SQL database server names.

2. If applicable, type the names of your SQL database servers, separated by commas.

3. Click **Continue**. The JetForm Central Options dialog appears.

For more information, see your JetForm Central documentation.

4. If applicable, specify the options you want FormFlow to use with JetForm Central.

5. Click **Continue**. The Security Systems dialog appears.

For more information on security, see Chapter 6 of *Getting Started*, or consult your security administrator.

6. Specify the security option you want to use with FormFlow, then click **Continue**.

7. If you selected **FormFlow (TIPEM) security**, the security directory dialog appears. Select the path you want to use for the security directory, then click **OK**.

See Appendix B of *Getting Started* for details on supported mail systems.

8. In the Supported Mail Systems dialog, specify the mail systems you want to install. Click **Continue**.

9. If you selected more than one mail system, the Default Mail System dialog appears. Select the default mail system you want FormFlow to use, then click **Continue**.

10. Follow the instructions on the screen to complete the installation.

Choosing a Minimum Installation

A minimum installation requires approximately 15 MB of free space on your hard drive.

A minimum installation installs only the Filler program files and mail system support. Use this option if you have a limited amount of available hard disk space.

➤To do a minimum installation

1. Click the minimum installation button. The Supported Mail Systems dialog appears.
2. Specify the mail systems you want to install, then click **Continue**.
3. If you selected more than one mail system, the Default Mail System dialog appears. Select the default mail system you want FormFlow to use, then click **Continue**.
4. Follow the instructions on the screen to complete the installation.

See Appendix B of *Getting Started* for details on supported mail systems.

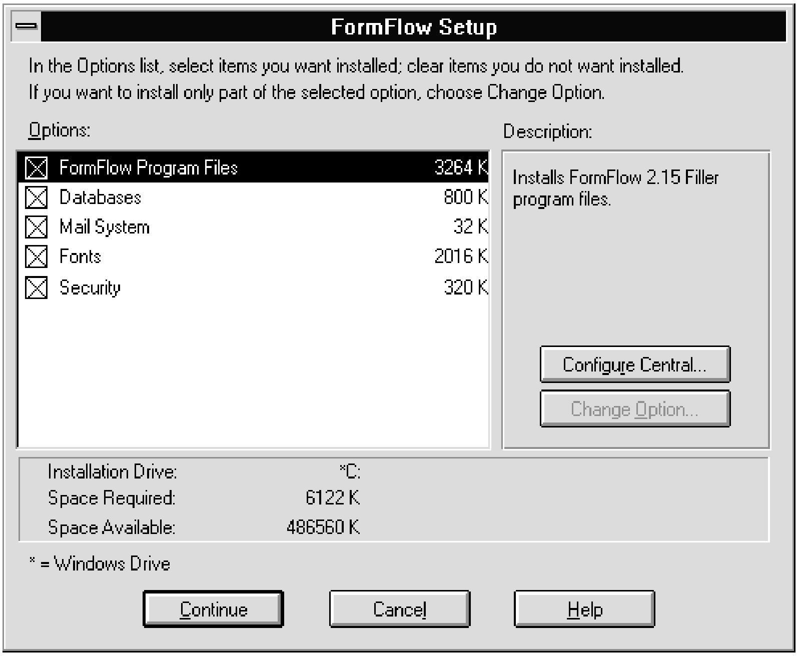
Choosing a Custom Installation

With a custom installation, you can choose the options you want to install. Use this option if:

- you have a minimum amount of available hard disk space, but you want to install more than just the FormFlow program files
- you want to add specific components, such as additional database support, after you have already installed FormFlow.

➤To do a custom installation

1. Click the custom installation button. The following dialog appears.



See “Installation Options” on page 2-25.

2. Select the options you want to install. To install only part of an option, select it, then click **Change Option**.

See “Checking for Sufficient Disk Space” on page 2-4.

   The space required for a custom installation varies with the options you select. The disk space required for each option appears to the right. The total disk space required for all options you have selected appears at the bottom of the dialog.

3. When finished specifying the options you want to install, click **Continue**.

4. Follow the instructions on the screen to complete the installation.

Installing Filler on a Network Server

Installation Notes

See "Reviewing the Installation Checklist" on page 2-3.

When you install Filler on a network server:

- You must have sufficient storage and appropriate access rights to the area on your network to which you are copying the contents of the Filler CD-ROM or disks. Ensure that you have the following rights on the network directory: read, write, file scan, and create.
- Ensure that you install the version of Filler from the Filler CD-ROM or disks only on end user workstations. Do not install Filler from the Filler CD-ROM on a workstation on which Filler has already been installed from the FormFlow Starter Kit, as the version of Filler on the Starter Kit CD-ROM contains special testing features for the forms designer and administrator.

FormFlow Installation Scenarios

The table on the following page illustrates the four possible configurations for installing FormFlow on a network server. Select the scenario appropriate for you in the left column of the table, then read across the table to find out which actions you need to perform, and the sequence in which you must perform them.

Notes: When performing the steps for the chosen scenario:

- run NETCOPY.EXE from Disk#1 or from the \DISK1 subdirectory of the Filler CD-ROM
- run SETUP.EXE from the network directory to which you copied the installation disks.

Each scenario is discussed in more detail after the table.

Scenario	Run:	To do the following:
FormFlow on Local Workstations With Local Windows	1. NETCOPY.EXE	Copy contents of installation disks to network server.
	2. SETUP.EXE, then **Local FormFlow with local Windows**	Install FormFlow specific files (including DFFILL.EXE), along with Windows support files (TrueType fonts, DLLs) onto each local workstation.
FormFlow on Local Workstations With Shared Windows	1. NETCOPY.EXE	Copy contents of installation disks to network server.
	2. SETUP.EXE, then **Local FormFlow with shared Windows**, then **Configure network server**	Install Windows support files (TrueType fonts, DLLs) to Windows directory on network server.
	3. SETUP.EXE, then **Local FormFlow with shared Windows**, then **Configure local workstation**	Install FormFlow specific files (including DFFILL.EXE), along with Windows support files (TrueType fonts, DLLs) onto each local workstation.
FormFlow on Network Server With Local Windows	1. NETCOPY.EXE	Copy contents of installation disks to network server.
	2. SETUP.EXE, then **Shared FormFlow with local Windows**, then **Configure network server**	Install FormFlow specific files (including DFFILL.EXE), along with Windows support files (TrueType fonts, DLLs) onto network server.
	3. SETUP.EXE, then **Shared FormFlow with local Windows**, then **Configure local workstation**	Install Windows support files (TrueType fonts, DLLs) to Windows directory on each local workstation. Configure each local workstation. Install DFCONFIG.INI, and set appropriate path statements.
FormFlow on Network Server With Shared Windows	1. NETCOPY.EXE	Copy contents of installation disks to network server.
	2. SETUP.EXE, then **Shared FormFlow with shared Windows**, then **Configure network server**	Install FormFlow specific files (including DFFILL.EXE), along with Windows support files (TrueType fonts, DLLs) onto network server.
	3. SETUP.EXE, then **Shared FormFlow with shared Windows**, then **Configure local workstation**	Configure each local workstation. Install DFCONFIG.INI, and set appropriate path statements.

Performing a Network Installation

The first step in any of the four preceding scenarios is usually to copy the contents of the Filler CD-ROM or disks onto the network server. However, when installing FormFlow locally with local Windows, using NETCOPY.EXE is an optional step. If you do not want to copy the CD or disks to the server, FormFlow can be installed on individual workstations using the installation CD or disks.

Understanding the Network Copy Program

When you run NETCOPY.EXE, the program:

- automatically creates the directory you specify, along with subdirectories (\DISK1, \DISK2, and so on) for each disk image.
- copies the files on the Filler CD-ROM to the appropriate destination subdirectories on your network.

➤To copy FormFlow disk images onto the network server using NETCOPY

1. Insert the Filler Pack CD-ROM into your CD-ROM drive, or insert Disk 1 of the disk set into your disk drive.

2. If you have a CD-ROM, in Windows File Manager, locate the \DISK1 subdirectory.

3. Locate the Netcopy program, NETCOPY.EXE. Double click the file to run the program. The FormFlow Netcopy Program dialog appears.

4. The source directory is the location from which you want to copy the FormFlow disk images. By default, the current directory appears in the Directory section. If this is not the correct source directory, click **Browse** and use the file selector to locate the correct directory.

5. Click Destination Directory. This is the directory to which you want to copy the FormFlow disk images. To change the default location that appears in the Directory section, click **Browse** and use the file selector to locate the network drive and directory to which you want to copy the contents of the FormFlow installation disks.

6. Click **OK**. The FormFlow disk images, containing all the installation files and programs, are copied to your network server.

Installing FormFlow on Local Workstations With Local Windows

Before installing FormFlow onto each local workstation, decide which of the following installation methods you want to use:

- use the installation CD or disks
- copy all FormFlow files from your CD-ROM or disk set onto the network server using NETCOPY.EXE or another file copy method.

Configuring the Network Server

See “Understanding the Network Copy Program” on page 2-12.

Run NETCOPY.EXE. When you run NETCOPY.EXE, the program copies disk images containing all the FormFlow installation files onto the network server. When the files have been copied onto the server, you can run SETUP.EXE and configure each local workstation.

Configuring a Local Workstation

When you run SETUP.EXE, the program:

- creates a directory in the location you specify, if the directory does not already exist
- copies the FormFlow files you select to the directory
- sets up default locations for the end user’s initialization and preferences files (adds the lines, DFConfigPath= and PrefsPath=, to the user’s WIN.INI file, and assigns them the path you specify in this program for the FormFlow program files).

➤To install FormFlow onto a local workstation

1. On the local workstation, do one of the following:
   - Insert the Filler Pack CD-ROM into the CD-ROM drive, or Disk 1 of the disk set into the disk drive.
   - Use Windows File Manager to locate the network directory to which you copied the contents of the Filler Pack CD-ROM or disks.

2. On the Program Manager File menu, click **Run**.

3. In the Run dialog, type:

   N:\SETUP

   then click **OK**. If the drive you are using has a letter other than N, substitute that letter for N. The installation welcome dialog appears.

4. Click **Continue** to proceed with the installation. The installation scenarios dialog appears. To cancel the installation and return to Windows, click **Exit Setup**.

5. Click **Local FormFlow with local Windows**.

6. Click **Continue**. The personal information dialog appears. Type the user's name and organization.

7. Click **Continue**, then click **Continue** again to confirm the user's personal information. The destination directory dialog appears.

8. Do one of the following:
   - To accept the default directory, click **OK**. If you have a previously installed version of FormFlow, the installation detects this and displays your current FormFlow directory. Accepting the default directory will replace your existing version.
   - To install to a different directory, click **Browse** and use the Select Directory dialog to choose another destination. If you have a previously installed version of FormFlow in the default directory, installing to a different destination installs a new version separately.

See "Installing Filler on a Standalone Computer" on page 2-5.

9. Click **Full**, **Minimum** or **Custom** depending on the kind of installation you want.

10. Follow the instructions on the screen to complete the installation.

11. Repeat step #1 to step #10 for each local workstation on which you want to install FormFlow.

See "Registering Your FormFlow Package" on page 2-34.

Installing FormFlow on Local Workstations With Shared Windows

If you want to install FormFlow on local workstations which share Windows files from a network server, you need to:

- copy all FormFlow files from your CD-ROM or disk set onto the network server
- copy Windows support files to the network server's Windows directory
- install FormFlow onto each local workstation.

Configuring the Network Server

See "Understanding the Network Copy Program" on page 2-12.

When you configure the network server, FormFlow:

- copies Windows support files (TrueType fonts and DLLs) to the Windows directory you specify on the network server
- sets up the path to a common network directory in which the security database file will be stored.

➤To set up the network server

1. Run NETCOPY.EXE. When you run NETCOPY.EXE, the program copies disk images containing all the FormFlow installation files onto the network server.

2. To install Windows support files onto the network server, use Windows File Manager to locate the network directory to which you copied the contents of the Filler Pack CD-ROM or disks.

3. On the Program Manager File menu, click **Run**.

4. In the Run dialog, type:

   N:\SETUP

   then click **OK**. If the network drive you are using has a letter other than N, substitute that letter for N. The installation welcome dialog appears.

5. Click **Continue** to proceed with the installation. The installation scenarios dialog appears. To cancel the installation and return to Windows, click **Exit Setup**.

6. Click **Local FormFlow with shared Windows**.

7. Click **Continue**. The Local FormFlow with Shared Windows dialog appears.

8. Click **Configure network server**.

9. Click **Continue**. The Destination Paths dialog appears.

10. Click each of the following options to check the specified location:
    - **Windows Directory** – the Windows directory on your network to which Windows support files (TrueType fonts and DLLs) are to be copied
    - **Security Directory** – the drive and directory in which the security database file will be stored.

Configuring a Local Workstation

When you configure a local workstation, FormFlow:

- copies FormFlow program files, and related Windows support files, to the directories you specify on the user's hard drive
- sets up a private location for the user's initialization and preferences files (adds the lines, DFConfigPath= and PrefsPath=, to the user's WIN.INI file, and assigns them the path you specify for the FormFlow program files)
- sets up a reference to the network security database (adds the line, Security=, to the user's DFCONFIG.INI file, and assigns it the path you specify for security)
- sets up a private location for the user's mail system settings (adds the line, MailUserPath=, to the user's DFCONFIG.INI file, and assigns it the path you specify as the send / receive configuration path).

➤To set up a local workstation

1. On the local workstation, use Windows File Manager to locate the network directory to which you copied the contents of the Filler Pack CD-ROM or disks.
2. On the Program Manager File menu, click **Run**.
3. In the Run dialog, type:

   ```
   N:\SETUP
   ```

   then click **OK**. If the network drive you are using has a letter other than N, substitute that letter for N. The installation welcome dialog appears.
4. Click **Continue** to proceed with the installation. The installation scenarios dialog appears. To cancel the installation and return to Windows, click **Exit Setup**.
5. Click **Local FormFlow with shared Windows**.
6. Click **Continue**. The Local FormFlow with Shared Windows dialog appears.
7. Click **Configure local workstation**.
8. Click **Continue**. The personal information dialog appears.
9. Type the user's name and organization.

10. Click **Continue**, then click **Continue** again to confirm the user's personal information. The destination directory dialog appears.

11. Do one of the following:
    - To accept the default directory, click **OK**. If there is a previously installed version of FormFlow, the installation detects this and displays the current FormFlow directory. Accepting the default directory will replace the existing version.
    - To install to a different directory, click **Browse** and use the Select Directory dialog to choose another destination. If there is a previously installed version of FormFlow in the default directory, installing to a different destination installs a new version separate from the existing version. Click **OK**.

For more information on the FormFlow .INI files, see .INI Files in the Troubleshooting section of the FormFlow online help.

We recommend that, wherever possible, you place initialization, preferences, and configuration files in private directories on the server, or on individual workstations. Storing these files in separate, private directories allows network users to share a single copy of Windows and FormFlow without having to share the same program configuration settings.

12. In the Destination Paths dialog, click each of the following options to check the specified location:
    - **FormFlow Files** – the local drive and directory to which the FormFlow program files are to be copied. This is also the location in which the user's preferences and initialization files (DFCONFIG.INI, FORMFLOW.INI, DFFILL.PRF) will be stored.
    - **Windows Directory** – the local drive and directory to which Windows support files are to be copied.
    - **Security Directory** – the drive and directory in which the security database file will be stored.
    - **Tracking Database Path** – the drive and directory in which the tracking database is to be stored.
    - **Send/Receive Configuration Path** – the local drive and directory in which the user's mail system settings (contained in DFSEND.INI) are to be stored.

13. When finished, click **OK**. The installation options dialog appears. See "Installation Options" on page 2-25.

14. Select the options you want to install.

15. When finished, click **Continue**.

16. Follow the instructions on the screen to complete the installation.

17. Repeat step #1 to step #16 for each local workstation on which you want to install FormFlow.

See “Registering Your FormFlow Package” on page 2-34.

Installing FormFlow on a Network Server With Local Windows

If you want to install FormFlow onto a network server to be shared by local workstations (which each have Windows files installed locally), you need to:

- copy all FormFlow files from your CD-ROM or disk set onto the network server
- copy Windows support files to the network server’s Windows directory
- install FormFlow onto the network server
- copy Windows support files to each local workstation’s Windows directory.

Configuring the Network Server

➤**To set up the network server**

See “Understanding the Network Copy Program” on page 2-12.

1. Run NETCOPY.EXE. When you run NETCOPY.EXE, the program copies disk images containing all the FormFlow installation files onto the network server.

2. Use Windows File Manager to locate the server directory to which you copied the contents of the Filler Pack CD-ROM or disks.

3. On the Program Manager File menu, click **Run**.

4. In the Run dialog, type:

   N:\SETUP

   then click **OK**. If the network drive you are using has a letter other than N, substitute that letter for N. The installation welcome dialog appears.

5. Click **Continue** to proceed with the installation. The installation scenarios dialog appears. To cancel the installation and return to Windows, click **Exit Setup**.

6. Click **Shared FormFlow with local Windows**.

7. Click **Continue**. The Shared FormFlow with Local Windows dialog appears.

8. Click **Configure network server**.

9. Click **Continue**. The personal information dialog appears.

10. Type your name and organization.

11. Click **Continue**, then click **Continue** again to confirm your personal information. The destination directory dialog appears.

12. Do one of the following:
    - To accept the default directory, click **OK**. If there is a previously installed version of FormFlow, the installation detects this and displays the current FormFlow directory. Accepting the default directory will replace the existing version.
    - To install to a different directory, click **Browse** and use the Select Directory dialog to choose another destination. If there is a previously installed version of FormFlow in the default directory, installing to a different destination installs a new version separate from the existing version. Click **OK**.

13. In the Destination Paths dialog, click each of the following options to check the specified location:
    - **FormFlow Files** – the network drive and directory to which the FormFlow program files are to be copied. This is also the location in which the shared preferences and initialization files (DFCONFIG.INI, FORMFLOW.INI, DFFILL.PRF) will be stored.
    - **Windows Directory –** the network drive and directory to which Windows support files are to be copied.
    - **Security Directory** – the drive and directory in which the security database file will be stored.
    - **Tracking Database Path** – the drive and directory in which the tracking database is to be stored.
    - **Send/Receive Configuration Path –** the network drive and directory in which shared mail system settings (contained in DFSEND.INI) are to be stored.

14. When finished, click **OK**. The installation options dialog appears.

15. Select the options you want to install.

16. When finished, click **Continue**.

17. Follow the instructions on the screen to complete the installation.

Note: If you are installing FormFlow onto a network, you cannot use a universal naming convention (UNC) path when specifying the destination directory. If necessary, you can assign (map) a drive letter to the volume you want to use during the installation process (Windows 3.11 and 95 only). In the Select Directory dialog, click **Network**, and use the Connect Network Drive dialog to map the volume you want to use. For more information on using this dialog, click **Help** to see Windows online help.

Configuring the Local Workstation

When you configure a local workstation, FormFlow:

- copies Windows support files to Windows directory on the local workstation
- updates the NETWORK.INI file with information on the location of shared FormFlow files
- sets up a shared location for the initialization and preferences files of all users (adds the line, SharedFiller=, to the NETWORK.INI file, and assigns it the path you specify in this program for the FormFlow program files)
- sets up a reference to the network security database (adds the line, SharedSecurity=, to the NETWORK.INI file, and assigns it the path you specify in this program for security)
- sets up a shared location for the mail system settings of all users (adds the line, SharedMailCfg=, to the NETWORK.INI file, and assigns it the path you specify in this program for the send / receive configuration path)
- sets up a shared location for the Paradox databases shared by all users (adds the line, SharedParadox=, to the NETWORK.INI file, and assigns it the path you specify in this program for the FormFlow program files).

➤To set up a local workstation

1. On the local workstation, use Windows File Manager to locate the network directory to which you copied the contents of the Filler Pack CD-ROM or disks.

2. On the Program Manager File menu, click **Run**.

3. In the Run dialog, type:

   N:\SETUP

   then click **OK**. If the network drive you are using has a letter other than N, substitute that letter for N. The installation welcome dialog appears.

4. Click **Continue** to proceed with the installation. The installation scenarios dialog appears. To cancel the installation and return to Windows, click **Exit Setup**.

5. Click **Shared FormFlow with local Windows**. The Shared FormFlow with Local Windows dialog appears.

6. Click **Configure local workstation**.

7. Click **Continue**. The Destination Paths dialog appears.

For more information on mail system settings, see the FormFlow online help under the Options dialog, Mail Systems tab.

8. Click each of the following options to check the specified location:
   - **FormFlow Files** – the local drive and directory to which the FormFlow program files are to be copied. This is also the location in which the shared preferences and initialization files (DFCONFIG.INI, FORMFLOW.INI, DFFILL.PRF) will be stored.
   - **Windows Directory –** the local drive and directory to which Windows support files are to be copied.
   - **Security Directory** – the drive and directory in which the security database file will be stored.
   - **Tracking Database Path** – the drive and directory in which the tracking database is to be stored.
   - **Send/Receive Configuration Path –** the local drive and directory in which shared mail system settings (contained in DFSEND.INI) are to be stored.

9. Follow the instructions on the screen to complete the installation.

10. Repeat step #1 to step #9 for each local workstation you want to set up.

See “Registering Your FormFlow Package” on page 2-34.

Installing FormFlow on a Network Server With Shared Windows

If you want to install FormFlow onto a network server to be shared by local workstations (which also share Windows files from the network server), you need to:

- copy all FormFlow files from your CD-ROM or disk set onto the network server
- copy Windows support files to the network server’s Windows directory
- install FormFlow onto the network server.

Configuring the Network Server

➤To set up the network server

See “Understanding the Network Copy Program” on page 2-12.

1. Run NETCOPY.EXE. When you run NETCOPY.EXE, the program copies disk images containing all the FormFlow installation files onto the network server.

2. Use Windows File Manager to locate the server directory to which you copied the contents of the Filler Pack CD-ROM or disks.

3. On the Program Manager File menu, click **Run**.

4. In the Run dialog, type:

   ```
   N:\SETUP
   ```

   then click **OK**. If the network drive you are using has a letter other than N, substitute that letter for N. The installation welcome dialog appears.

5. Click **Continue** to proceed with the installation. The installation scenarios dialog appears. To cancel the installation and return to Windows, click **Exit Setup**.

6. Click **Shared FormFlow with shared Windows**.

7. Click **Continue**. The Shared FormFlow with Shared Windows dialog appears.

8. Click **Configure network server**.

9. Click **Continue**. The personal information dialog appears.

10. Type your name and organization.

11. Click **Continue,** then click **Continue** again to confirm your personal information. The destination directory dialog appears.

12. Do one of the following:
    - To accept the default directory, click **OK**. If there is a previously installed version of FormFlow, the installation detects this and displays the current FormFlow directory. Accepting the default directory will replace the existing version.
    - To install to a different directory, click **Browse** and use the Select Directory dialog to choose another destination. If there is a previously installed version of FormFlow in the default directory, installing to a different destination installs a new version separate from the existing version. Click **OK**.

13. In the Destination Paths dialog, click each of the following options to check the specified location:
    - **FormFlow Files** – the network drive and directory to which the FormFlow program files are to be copied. Preferences and initialization files (DFCONFIG.INI, FORMFLOW.INI, DFFILL.PRF) are stored locally in this configuration.
    - **Windows Directory –** the network drive and directory in which shared Windows files are stored.
    - **Security Directory** – the drive and directory in which the security database file will be stored.
    - **Tracking Database Path** – the drive and directory in which the tracking database is to be stored.
    - **Send/Receive Configuration Path –** the network drive and directory in which the shared mail system settings (contained in DFSEND.INI) are to be stored.

14. When finished, click **OK**. The installation options dialog appears.

15. Select the options you want to install.

16. When finished, click **Continue**.

17. Follow the instructions on the screen to complete the installation.

Note: If you are installing FormFlow onto a network, you cannot use a universal naming convention (UNC) path when specifying the destination directory. If necessary, you can assign (map) a drive letter to the volume you want to use during the installation process (Windows 3.11 and 95 only). In the Select Directory dialog, click **Network**, and use the Connect Network Drive dialog to map the volume you want to use. For more information on using this dialog, click **Help** to see Windows online help.

Configuring a Local Workstation

When you configure a local workstation, FormFlow updates a NETWORK.INI file to contain information on the location of shared FormFlow files, including the path you specify for initialization and preference files, the program files, the security files, mail system settings and shared database information.

➤To set up a local workstation

1. On the local workstation, use Windows File Manager to locate the network directory to which you copied the contents of the Filler Pack CD-ROM or disks.

2. On the Program Manager File menu, click **Run**.

3. In the Run dialog, type:

   ```
   N:\SETUP
   ```

   then click **OK**. If the network drive you are using has a letter other than N, substitute that letter for N. The installation welcome dialog appears.

4. Click **Continue** to proceed with the installation. The installation scenarios dialog appears. To cancel the installation and return to Windows, click **Exit Setup**.

5. Click **Shared FormFlow with shared Windows**.

6. Click **Continue**. The Shared FormFlow with Shared Windows dialog appears.

7. Click **Configure local workstation**.

8. Click **Continue**. The Destination Paths dialog appears.

9. Click each of the following options to check the specified location:
   - **FormFlow Files** – the local drive and directory to which the FormFlow program files are to be copied. Preferences and initialization files (DFCONFIG.INI, FORMFLOW.INI, DFFILL.PRF) are stored locally in this configuration.
   - **Windows Directory –** the local drive and directory in which shared Windows files are stored.
   - **Security Directory** – the drive and directory in which the security database file will be stored.
   - **Tracking Database Path** – the drive and directory in which the tracking database is to be stored.
   - **Send/Receive Configuration Path –** the local drive and directory in which the shared mail system settings (contained in DFSEND.INI) are to be stored.

10. Follow the instructions on the screen to complete the installation.

11. Repeat step #1 to step #10 for each local workstation you want to set up.

See “Registering Your FormFlow Package” on page 2-34.

Installation Options

The following options are available:

FormFlow Program Files

This option installs all Filler program and help files. To specify the options you want FormFlow to use with JetForm Central, click **Configure Central**.

Databases

For more information on FormFlow database support, see Chapter 5 in the *Form Designer User’s Guide*.

FormFlow automatically installs database support for ASCII and dBASE databases. By selecting the Databases option, you can also install support for the following:

- Paradox

- Clipper
- ODBC
- Lotus Notes
- SQL databases, including Oracle, Sybase, SQL Server, DBM and DB2.

If you want to select which types of database support to install, click **Change Option**.

If you choose to install SQL database support, you can specify the types of SQL databases you want to use. Select the SQL option, then click **Change Option**. Select the types of SQL databases you want to install support for:

- IBM Database 2 (DB2)
- OS/2 Database Manager (DBM)
- Oracle
- Sybase
- Microsoft SQL Server 4.x
- Microsoft SQL Server 6.x.

You must enter a server name for each SQL database you want to use. For each type of SQL database you select, click **Configure**, then enter the server name.

Notes:

- If you want to use DBM databases, you must catalog them before they can be used. For more information, see Chapter 5 in the *Form Designer User's Guide*.
- For further information on the DFSQL.INI file, see .INI Files in the Troubleshooting section of FormFlow online help.

Mail Systems

You can use FormFlow to send and receive forms and data using:

Novell MHS and WinFax support sending and receiving using FormFlow, except workflow task routing.

- AT&T Mail
- Banyan Vines
- cc:Mail
- Lotus Notes
- Microsoft Exchange
- Microsoft Mail
- Novell GroupWise
- Novell MHS

- WinFax (BFT).

For more information on using Exchange as a mail system, see ”Using Microsoft Exchange” in Appendix B of *Getting Started*.
For information on registering FormFlow forms into Exchange, see ”Setting Up Form Library Folders” in Chapter 5 of *Getting Started*.

To select which mail systems you want to install, click **Change Option**. If you choose more than one mail system, the Default Mail System dialog appears. Select the default mail system you want FormFlow to use.

Fonts

FormFlow installs two TrueType and two Type Director fonts:

- TrueType CG Times
- TrueType Univers
- CG Times (WN)
- Univers (WN).

Note: If your form designs use third-party fonts, such as the Type Director Univers (WN) or CG Times (WN) fonts supplied with FormFlow, ensure that you enable the enhanced fonts options on the General tab of the Options dialog in Form Designer.

Security

When installing FormFlow, you can choose one of the following security options:

- **FormFlow (TIPEM) security** – enables you to create and administer security users using the Security Administrator provided with the FormFlow Starter Kit, and to use the FormFlow system of private and public keys for your users. Note that FormFlow security can only be used by FormFlow.
- **Entrust™ security** – requires installation of the Entrust client. Entrust security can be used with a variety of different applications. Note that if you are already using Entrust security with FormFlow, you must use Entrust Manager to create and administer users.
- **no security** – if you have no need to encrypt form data or use digital signatures. Without security, you cannot use the FormFlow Verify Signature command or create any security users, since the Security Administrator is not installed.

Performing a Silent Installation

“Silent” installations set up software on users’ computers with little or no user input during the installation process. This is useful when you need to configure many identical workstations. You can create a silent installation file for FormFlow Filler by running the SETUP.EXE file using specific parameters. Once you have created the file, you can run the Setup program, with the silent installation file specified as a parameter, to install FormFlow onto a user’s hard drive.

When you perform a silent install on a user’s computer, a FORMFLOW.LOG file is created in the user’s \WINDOWS directory. You can use this file to ensure the correct options were installed, or to determine the source of a problem if the installation was unsuccessful.

➤To create a silent installation file

1. In Windows 3.1 File Manager, go to the \DISK1 subdirectory in the network directory where you have copied the FormFlow disk images. If you have the Filler Pack CD, this will be the \FORMFLOW directory.

2. On the File menu, click **Run**. The Run dialog appears.

3. In the Run dialog, type the following:

   SETUP.EXE /w [name of desired output file]

   For example, if you run SETUP with the following parameters ...

   SETUP.EXE /w T:\FORMFLOW\SILENT.INI

   ... FormFlow Setup starts, and you can choose the Filler options you want to install.

After you choose the options you want, FormFlow Setup finishes by creating the T:\FORMFLOW\SILENT.INI file with the selected installation options enabled. Filler Pack includes the file \DISK1\SILENT.INI (or \FORMFLOW\SILENT.INI if you are using the Filler Pack CD) as an example of the output file.

➤To use the silent installation file to install FormFlow

1. On the local workstation, use File Manager to locate the same network directory from which you ran SETUP.EXE to create the SILENT.INI file.

2. On the File menu, click **Run**. The Run dialog appears.

3. Type the following:

   ```
   SETUP.EXE /r T:\FORMFLOW\SILENT.INI
   ```

   Filler is installed from the FormFlow files in T:\FORMFLOW onto the local workstation where you are now running FormFlow Setup, using the options you created in the T:\FORMFLOW\SILENT.INI file.

4. Repeat steps 1 to 3 for the other local workstations on which you want to perform silent installations of Filler.

Microsoft Systems Management Server (SMS)

If you have the FormFlow Filler Pack CD, FormFlow Filler can now be remotely installed on a user's computer using Microsoft Systems Management Server. When you install Filler using SMS, you have two options:

- install Filler "silently", with little or no user input during the installation process
- install Filler using the regular installation process, allowing full user input during installation.

To install Filler "silently" using SMS, you need:

- a SILENT.INI file, generated using the procedure described earlier in this chapter
- the FORMFLOW.PDF file, available in the \FORMFLOW directory on the CD.

To install Filler using a package that allows user input during installation, you need:

- the FORMFLOW.PDF file, available in the \FORMFLOW directory on the CD.

See your SMS documentation for information on creating installation packages for use with SMS.

Customizing Your Installation

After installing FormFlow, you can run the Setup program again at any time to install other FormFlow features.

➤To customize your installation

1. Start Windows. Insert the FormFlow Filler CD-ROM into your CD-ROM drive, or Disk 1 of the disk set into your disk drive.

2. On the Program Manager File menu, click **Run**.

3. In the Run dialog, type:

   D:\SETUP

   then click **OK**. If the CD-ROM or disk drive you are using has a letter other than D, substitute that letter for D. The installation welcome dialog appears.

4. Click **Continue** to proceed with the installation. The personal information dialog appears. To cancel the installation at any time and return to Windows, click **Exit Setup**.

5. Type in your name and organization.

6. Click **Continue**, then click **Continue** again to confirm your personal information. The destination directory dialog appears.

7. The installation detects your previously installed version of FormFlow, and displays the current FormFlow directory as the default destination. To accept the default directory and update your existing version of FormFlow, click **OK**. The installation type dialog appears.

8. Click the custom installation button. The installation options dialog appears.

See "Installation Options" on page 2-25.

See "Checking for Sufficient Disk Space" on page 2-4.

9. Select the options you want to add. Deselect all other options.

   The space required for a custom installation varies with the options you select. The disk space required for each option appears to the right. The total disk space required for all options you have selected appears at the bottom of the dialog.

10. When finished, click **Continue**.

11. Follow the instructions on the screen to complete the installation.

Running the Uninstall Program

If you decide to delete your copy of FormFlow, run the uninstall program. The uninstall program deletes all FormFlow files installed during the installation process. The uninstall does not delete FormFlow directories or data, including forms and associated databases, created after installation.

The uninstall program:

- removes all information used by FormFlow from your WINDOWS.INI file
- removes all FormFlow program files.

Note: The uninstall program uses the FORMFLOW\SETUP subdirectory. If you want to use the uninstall program, do not delete this directory or alter the files it contains.

➤To uninstall FormFlow

1. In the FORMFLOW\SETUP subdirectory, locate the Uninstall program, UNSETUP.EXE.
2. To run the Uninstall program, double click UNSETUP.EXE. The uninstallation welcome dialog appears.
3. Click **Uninstall**. A dialog appears asking if you really want to remove FormFlow.
4. Do one of the following:
   - To remove FormFlow, click **Yes**. The Uninstall program deletes all FormFlow files installed during the installation process.
   - To return to the uninstallation welcome dialog, click **No**.
5. In File Manager, if there are any remaining files in the FormFlow directory that you want to keep, move them to another directory.
6. Delete the FormFlow directory.

FormFlow File Types

The following chart lists the file types created by or associated with the different modules of FormFlow and found in your FORMFLOW directory. Use this chart if you need to search for certain information or want to delete unnecessary files to conserve disk space.

FormFlow includes its own uninstall program in the FORMFLOW\SETUP subdirectory. If you want to use the uninstall program, do not delete this directory or alter the files it contains.

File extension	Example	Description
.ADM	DFLIB.ADM	Administrator utilities
.BAK	FAX1.BAK	Form and ASCII database backup files
.BMP	DFINTRO.BMP	Windows bitmap graphic files for startup screens
.BOO	LOGO.BOO	Pasted bitmap graphic files
.CLX	ENG.CLX	Memory-resident spell checking dictionary for common words
.DB	REPORTS.DB	Paradox database files
.DBF	DPCTRACK.DBF	dBASE and Clipper database files
.DBT	EMPLOYEE.DBT	dBASE or Paradox 3.x memo field files
.DCT	USER.DCT	Custom spell checking dictionary
.DFN	FFNOTES.DFN	Lotus Notes database support files
.DLL	OLECLI.DLL	Dynamic Link Library files, program modules that are loaded into memory as required
.EBW	DFBEXTC.EBW	FormBasic extensions
.ENG	USER.ENG	English spelling dictionaries
.EXE	DFDESIGN.EXE	Program executable files
.FAL	MEDICAL.FAL	Locked form applications
.FAP	EMPLOYEE.FAP	Form applications
.FDB	LEADS.FDB	Descriptions for default databases
.FDS	EMPLOYEE.FDS	Lists of indexes associated with a database and the current sorting index
.FFL	REPORTS.FFL	ASCII database header files
.FIL	REPORTS.FIL	ASCII database files
.FLB	SUPPLIES.FLB	Form Library files
.FML	MACROS.FML	Macro library files

File extension	Example	Description
.FNT	HQ3.FNT	Type Director font files
.FOL	SYMBOL.FOL	Form object library files
.FOT	CGTIME.FOT	Metric files for TrueType scalable fonts
.FRL	FAX1.FRL	Locked forms
.FRP	FAX1.FRP	FormFlow forms
.FRW	STANDARD.FRW	Routing design files
.FWL	PURCHASE.FWL	Locked routing design files
.FXM	REPORT.FXM	Paradox 3.x memo field file components
.HLP	DFDESIGN.HLP	Online help files
.INI	DFCONFIG.INI	Initialization files specifying operating variables
.KRN	90133.KRN	Type Director font files
.LEX	ENG.LEX	Spelling dictionaries
.LIC	DCFSRVR.LIC	OLE control files
.LOG	DFFILL.LOG	Log files of forms filled
.LSZ	UNSETUP.LSZ	Compressed files for uninstall
.MB	EMPLOYEE.MB	Paradox 4.0 memo field files
.MSG	FORMFLOW.MSG	Error and status messages
.NDX	EMPLOYEE.NDX	dBASE index files
.NET	PDOXUSRS.NET	Paradox database locking files
.PHN	ENG.PHN	Phonetic rules for spell checker
.PRF	DFDESIGN.PRF	Operating and screen preferences
.PX	SALES.PX	Paradox index files
.SYM	TDR8.SYM	Type Director symbol files
.TD	TYPEFACE.TD	Type Director control files
.TYP	90133.TYP	Type Director font files
.TYQ	PLUGIN.TYQ	Type Director font files
.TYS	SCREEN.TYS	Type Director font files
.WMF	RECYCLE.WMF	Windows metafile graphic files
.WOO	LOGO.WOO	Pasted metafile graphic files
.WPK	PURCHASE.WPK	Routing task packages

Registering Your FormFlow Package

Benefits of Registration

Registration provides several benefits:

- special offers available only to registered customers
- information on enhancements, upgrades and new products
- the opportunity to tell us what you would like to see in future versions of this product.

Registration Card

To register your copy of FormFlow, complete the registration card enclosed with your product and fax it to the JetForm Information Center at (613) 751-4852 or mail the card to:

JetForm Information Center
JetForm Corporation
560 Rochester Street
Ottawa, ON K1S 5K2
Canada

If your address changes, mail or fax your new address to the JetForm Information Center.

Note: When installing the FormFlow Filler Pack, you need to complete and send in only one registration form, regardless of the number of users in your organization.

3

Getting Started with FormFlow Filler

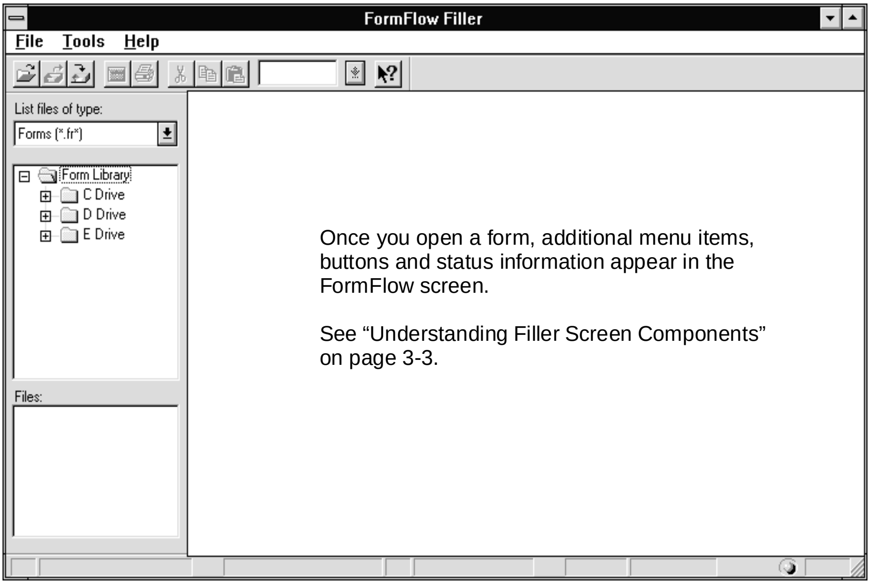
This chapter explains how to get started with FormFlow™ Filler. It covers the following topics:

- starting FormFlow Filler
- understanding the components of the FormFlow user interface
- opening a form, form application or routing map
- using the different types of help available to you
- customizing the FormFlow user interface.

Starting FormFlow Filler


Filler

To start FormFlow Filler, double click the Filler icon in Windows Program Manager. The initial, blank FormFlow Filler screen appears.

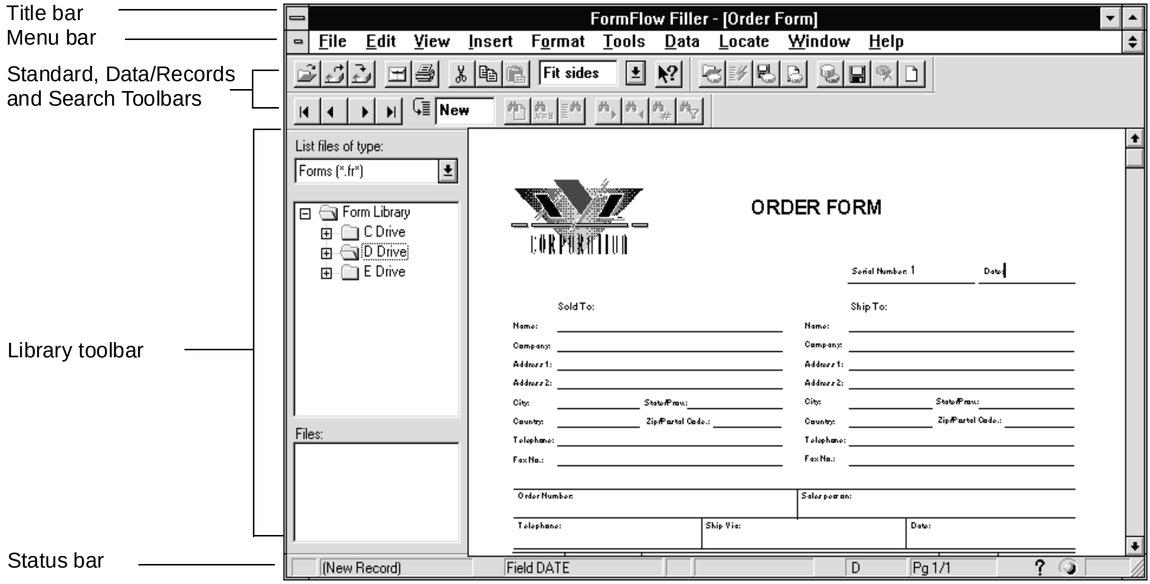


Once you open a form, additional menu items, buttons and status information appear in the FormFlow screen.

See “Understanding Filler Screen Components” on page 3-3.

Understanding Filler Screen Components

The following illustration shows the screen components that appear in the FormFlow user interface once you have opened a form.



Note: If your screen has different menus and buttons than this illustration, you must be working with a customized form application.

Understanding the Title Bar

The title bar shows one of the following:

- for a new, unsaved form, the form number—Form 1, Form 2, and so on
- for an existing form, the title specified in the Form Properties dialog—if no title is specified, the default is Form 1, Form 2, and so on.

Understanding the Menu Bar

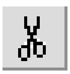
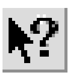
When you click a menu on the menu bar, the list of associated commands drops down.

Understanding Toolbars

While the menu bar provides access to *all* the available commands, some of the most frequently used tasks can also be performed by clicking a button on a toolbar. These buttons are described in the immediately following sections “Understanding the Standard Toolbar”, “Understanding the Data / Records Toolbar” and “Understanding the Search Toolbar”.

Understanding the Standard Toolbar

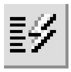
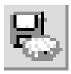
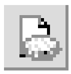
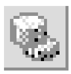
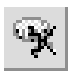
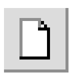
The standard toolbar contains buttons that you can use, as an alternative to a menu command, to perform the most frequently used generic tasks.

Button	Menu	Command	Use this button to ...
	File	Open	Open a form, form application or routing map.
	File	Send Form	Use your mail system to send a form.
	File	Receive Form	Use your mail system to receive a form.
	Tools	Package Form	Create a form package to send.
	File	Print	Print a form.
	Edit	Cut	Cut text from the currently active form field and place it on the Windows Clipboard.
	Edit	Copy	Copy text from the currently active form field to the Windows Clipboard.
	Edit	Paste	Copy text from the Windows Clipboard to the currently active form field.
	n/a		Display context-sensitive help for the field or other screen component you click after you click this button.

In addition to the buttons described in the preceding table, the Standard toolbar contains the Zoom control, equivalent to the **Zoom** command on the View menu. Use the Zoom control to adjust the magnification level up or down.

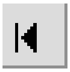
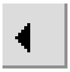
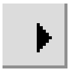
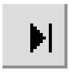
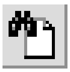
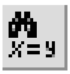
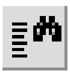
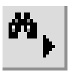
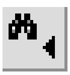
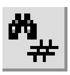
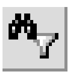
Understanding the Data/Records Toolbar

The Data/Records toolbar contains buttons that you can use, as an alternative to a menu command, to work with data in your form.

Button	Menu	Command	Use this button to ...
	Data	Open Data	Open a form database.
	Data	Select Index	Select a database index to use with the current form.
	Data	Save Data As	Create a new database, or save the existing database to a new name.
	Data	New Data	Open a blank record for the current form, without saving the currently open record.
	Data	Add Record	Save the current record to the database attached to the form.
	Data	Update Record	Save the changes you have made to an existing record.
	Data	Delete Record	Delete the current record from the database attached to the form.
	File	New	Add a new, blank record to the end of the database attached to the form.

Understanding the Search Toolbar

The toolbar contains buttons that you can use, as an alternative to a menu command, to locate specific data associated with your form.

Button	Menu / Submenu	Command	Use this button to ...
	Locate	First	Display the first record in the form database
	Locate	Previous	Display the record immediately preceding the currently active record.
	Locate	Next	Display the record immediately following the currently active record.
	Locate	Last	Display the last record in the form database.
	Locate / Search	Query By Form	Create a search expression by typing search criteria in the fields on a blank form.
	Locate / Search	Search on Expression	Create a search expression.
	Locate / Search	Search on Index Field	Search for records where indexed fields match your search criteria.
	Locate / Search	Search Next	Within the subset of records located by a search, display the record immediately following the currently active record.
	Locate / Search	Search Previous	Within the subset of records located by a search, display the record immediately preceding the currently active record.
	Locate / Search	Search Count	Count the number of records located by a search.
	View	Search Filter	Work only with the subset of records located by a search.

In addition to the buttons described in the preceding table, the Search toolbar contains the Go To Record control, equivalent to the **Go To Record** command on the Locate menu. Use this control to go to a specific record within the form database.

Understanding the Status Bar

As you fill a form, the Status Bar is continually updated with information about the current record, and the current field.

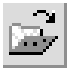
Icon or example	Description
	The current record is locked *or* The current table row is locked
Record 1/2	The current record is number nnnn of nnnn
	The current record is flagged for deletion *or* The current table row is flagged for deletion
Field UnitCost	The current field name
Row 1	The current table row number
Pg 1/1	The current form page is number nn of nn
L	A database lookup or a list lookup exists for the current field
?	Field Help is available for the current field
	The form has unsaved changes

Opening Forms, Form Applications and Routing Maps

You can open a form, form application or routing map in any of three ways:

- using the Open dialog
- using the Library Open dialog
- using the Form Library toolbar.

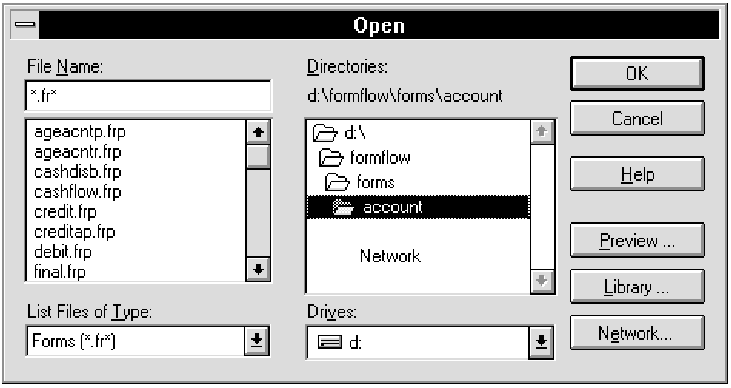
The three methods are described in the sections that follow.



➤To use the Open dialog to open a form, form application, or routing map

Quick keys: CTRL + O

1. On the File menu, click **Open**. The Open dialog appears.



2. If the file you want is on a different drive than the one displayed, click in the **Drives** box, then click the drive you want.

3. In the **Directories** box, double click the directory you want. A list of files appears.

4. To specify the type of files you want to display, click in the **List Files of Type** box, then click one of the following:

   - Forms (*.fr*)
   - Folders (*.fdr)
   - Form Packages (*.fpk)
   - Routing Designs (*.frw, *.fwl)
   - Form Applications (*.fa*)
   - All FormFlow (*.fr*, *.fa*, *.fdr, *.fpk, *.fwl)
   - All Files (*.*).

5. To help you identify the file you want, click **Preview** to display a miniature image of the file currently highlighted in the list of file names.

6. Click the name of the file you want to open, then click **OK**.

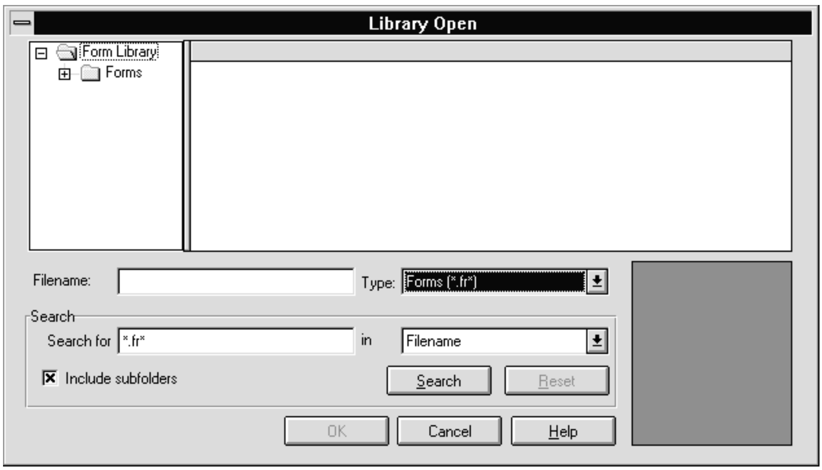
7. If you are opening a form package, and you are not already logged in to your mail system, the FormFlow Mail Login dialog appears. Type your user name and password.

➤To use the Library Open dialog to open a form, form application, or routing map

Quick key: CTRL + O

1. On the File menu, click **Open**. The Open dialog appears.

2. Click **Library**. The Library Open dialog appears, displaying the default Library File.

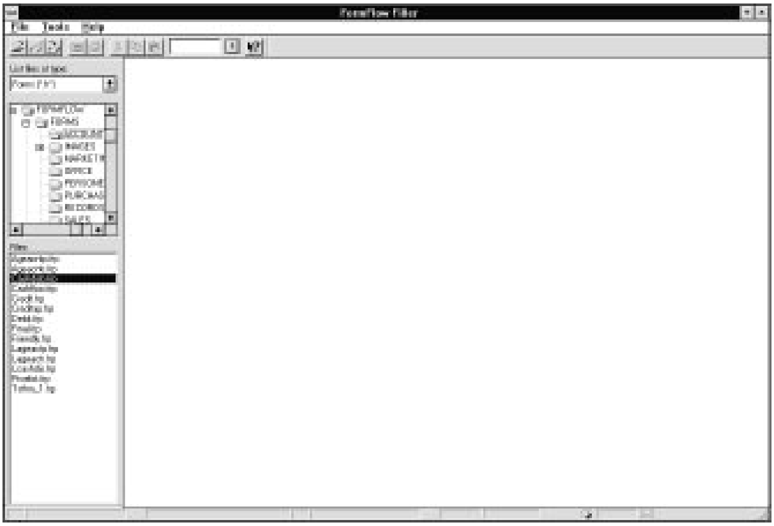


3. To search for a file, do the following:

   - In the folder tree at the top left of the dialog, double click the folder you want to expand. The files in that folder appear in the pane to the right.
   - Click in the **Type** box, click the type of files you want to search for, then click **Search**. The files appear in the pane to the right.
   - In the pane to the right, double click the name of the file that you want to open.

➤To use the Form Library toolbar to open a form, form application, or routing map

1. In the upper pane, click a folder. The files display in the **Files** pane.

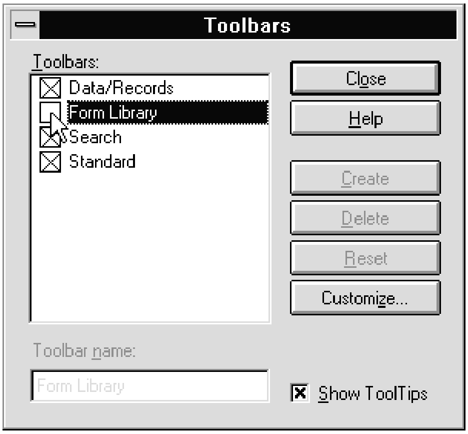


2. In the **Files** pane, do either of the following:
   - Double click the file you want to open.
   - Drag the file you want from the Files list to the workspace, then release the mouse button to open the file.

➤To display the Form Library toolbar

1. Use one of the two methods described above to open a form. Once you open a form, the full set of FormFlow menus displays on the menu bar.

2. On the View menu, click **Toolbars**. The Toolbars dialog appears.



3. Enable **Form Library**, then click **Close**. The FormFlow workspace adjusts to display the Library toolbar.

Using Help

See “Using FormFlow Online Help” on page 1-4.

In addition to online help, the following sources of help are also available to you:

- ToolTips
- field help
- field information.

These three help sources are described in the sections that follow.

ToolTips

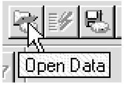
ToolTips are context-sensitive help messages that appear as “bubbles” of text, floating beside the associated screen element. All the standard FormFlow toolbar buttons have ToolTips.

In addition, the person who designed the forms you fill may have added ToolTips to individual fields on the forms.

➤To display a ToolTip

1. Place the mouse pointer over the field or button for which you want help.

2. Wait for a second or two, without moving the mouse or clicking the mouse buttons.



   The ToolTip appears below the screen element, and remains visible until you move the mouse again.

Field Help

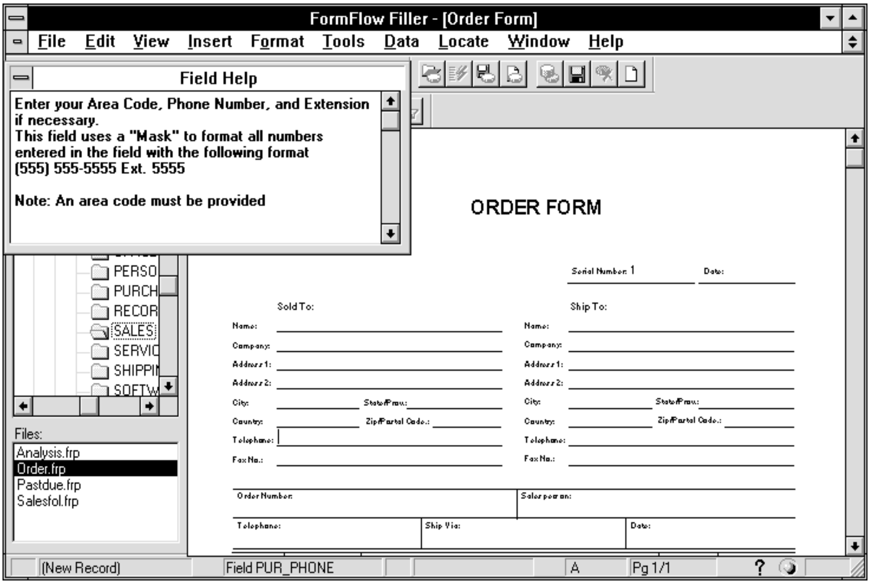
A field help message gives you information on how to fill an individual field on your form. Depending on how the form designer created the forms you are filling, there may be field help for some, all or none of the fields on any form.

As you move from field to field in your form, a question mark (?) appears on the status bar when field help exists for the currently active field.

Quick key: CTRL + F1

➤To display field help

On the View menu, click **Field Help**. The Field Help dialog appears.



You can leave the Field Help window open all the time. It is updated automatically as you move from field to field. You can also move or close the Field Help window at any time.

➤To move the Field Help window

Click the title bar and drag the window to a new location.

➤To close the Field Help window

Quick key: ESC

Double click the control menu box in the top left corner of the Field Help window.

Field Information

See "Understanding the Status Bar" on page 3-7.

As you move from field to field in your form, the status bar shows the following information on the currently active field:

- the field name
- the field format icon.

The following table explains the field formats.

Icon	Field format	Accepts this input ...
#	Numeric	Numbers
A	General	Any combination of letters and numbers
C	Check mark	Press the space bar to toggle on or off
D	Date	A valid date
S	Signature	A valid electronic signature

Customizing the FormFlow Interface

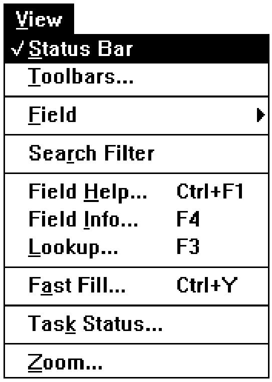
You can customize the appearance and the functionality of the FormFlow interface in the following ways:

- showing or hiding the status bar
- showing or hiding graphics
- showing or hiding non-printable fields
- showing or hiding traceable fields
- showing or hiding toolbars
- customizing toolbars.

➤To show or hide the status bar

See “Understanding the Status Bar” on page 3-7.

On the View menu, enable or disable **Status Bar**. A check mark appears to the left of the command when you enable it.



Tip: When you hide the status bar, you increase the FormFlow workspace available to show your form. However, you will not be able to see information the status bar provides, such as the number of the record you are viewing.

➤To show or hide graphics

Quick key: CTRL + F8

On the View menu, click **Field**, then click **Graphics**, to toggle the feature on or off. A check mark beside the command indicates that graphic images are displayed.

Tip: Hiding graphics saves you time, since FormFlow does not have to redraw each graphic whenever the screen is refreshed. Only the screen display is affected—a hidden graphic does not appear on the screen, but will print normally.

➤To show or hide non-printables

On the View menu, click **Field**, then click **Non-Printables**, to toggle the feature on or off. A check mark beside the command indicates that the Non-Printables feature is active.

Tip: Non-printable fields show on your screen, but are not printed. They are typically used in forms to be printed on preprinted stationery, or to let you see, but not print, confidential information.

➤To show or hide traceables

Quick key: F8

On the View menu, click **Field**, then click **Traceables**, to toggle the feature on or off. A check mark beside the command indicates that traceable graphic images are displayed.

Tip: Traceable graphic objects, unlike other graphic objects, cannot be printed, and are not considered part of the form. Traceable graphics can appear only on the screen, to be used as a guide when filling an electronic form to be printed on pre-printed stationery.

Customizing Toolbars

Most toolbars appear, by default, across the top of the screen, between the title bar and the workspace. The exception is the Form Library toolbar, which has vertical orientation, and appears at the side of the workspace.

You can move a toolbar to a new location, show or hide toolbars, create a new toolbar, add or remove buttons from a toolbar, restore a customized toolbar to its original state, or delete a toolbar.

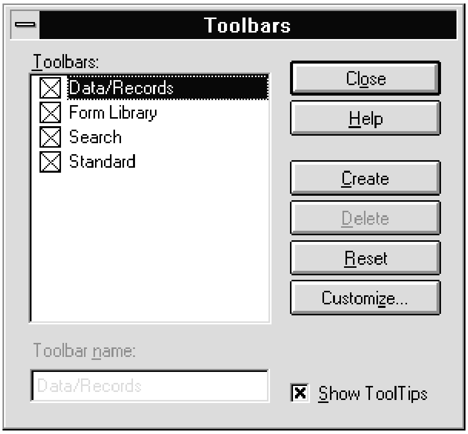
➤To move a toolbar

Click the toolbar you want to move at a point where there is no text or button, then drag the toolbar to the new location you want.

You can dock the toolbar on any of the four sides of the workspace, or leave it floating on the workspace.

➤To show or hide a toolbar

1. On the View menu, click **Toolbars**. The Toolbars dialog appears.



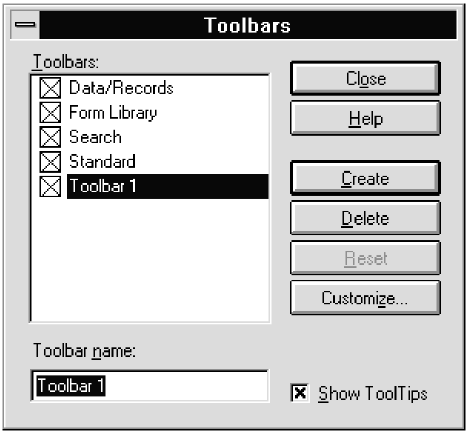
2. In the Toolbars section, click the check box to the left of a toolbar name, to enable or disable it.

3. When you have finished making changes, click **Close**.

➤To create a new toolbar

1. On the View menu, click **Toolbars**. The Toolbars dialog appears.

2. Click **Create**. A new toolbar appears in the Toolbars list, with the default name “Toolbar 1”.



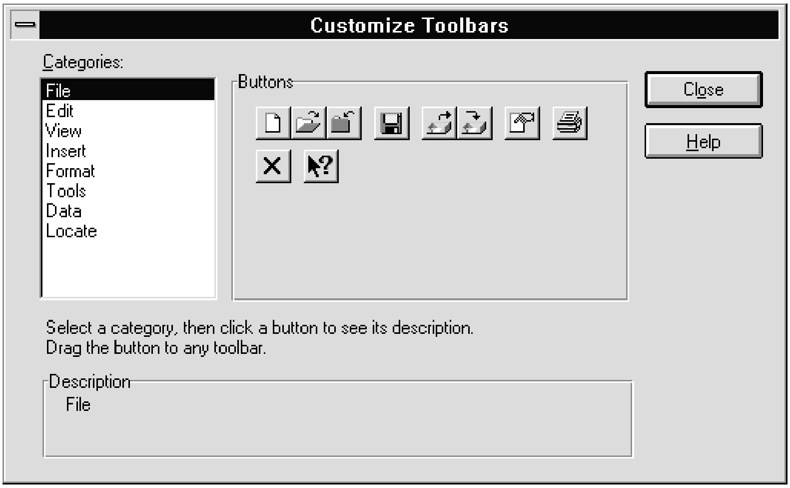
3. In the **Toolbar name** box, type a name for the new toolbar. The new, empty toolbar appears near the top left corner of your screen.

You can add buttons to this toolbar immediately, or change it later. See the following sections for details of how to add or remove buttons from a toolbar.

➤To add a button to a toolbar

1. On the View menu, click **Toolbars**. The Toolbars dialog appears.

2. Click **Customize**. The Customize Toolbars dialog appears.



3. In the **Categories** list, click the type of buttons you want to use. The buttons available for that category appear in the Buttons section.

4. Click any button in the Buttons section to make its description appear in the Description section.

5. Click the button you want to add, then drag it out of the dialog and drop it on the appropriate toolbar.

Repeat steps #3 through #5 as often as necessary, until the toolbars are as you want them.

➤To remove a button from a toolbar

1. On the View menu, click **Toolbars**. The Toolbars dialog appears.

2. Click **Customize**. The Customize Toolbars dialog appears.

3. While the Customize Toolbars dialog is open, click the button you want to remove, drag it off its toolbar, and drop it anywhere *except* on a toolbar.

➤To restore default buttons to a toolbar

1. On the View menu, click **Toolbars**. The Toolbars dialog appears.

2. In the Toolbars section of the dialog, click the name of the toolbar you want to restore to its default, then click **Reset**. The toolbar returns to its original state.

➤To delete a toolbar

1. On the View menu, click **Toolbars**. The Toolbars dialog appears.

2. In the Toolbars section of the dialog, click the name of the toolbar you want to delete, then click **Delete**. A confirmation dialog appears, asking if you want to delete the toolbar permanently.

3. Click **Yes**. The toolbar disappears from your screen.

4

Filling Forms

This chapter describes how to fill forms using FormFlow™ Filler. It covers:

- entering and editing text
- moving between fields
- filling tables and special fields
- using lookups
- spell checking text
- using information from other programs
- signing a form electronically.

Entering and Editing Text

Entering Text

When you first open a form in Filler, a flashing cursor appears in the first fillable field, and you can begin entering text. You can do this by:

- typing it from the keyboard
- using the **Paste** command on the Edit menu to insert text copied from another form, another field, or another Windows program
- using the **File** command on the Insert menu to select an existing ASCII text file to load into the field.

Moving the Cursor Within a Form Field

Use the following keys to move the cursor, select and edit text.

To	Press
Move the cursor one character to the right	RIGHT ARROW
Move the cursor one character to the left	LEFT ARROW
Move the cursor to the beginning of the next word	CTRL + RIGHT ARROW
Move the cursor to the beginning of the previous word	CTRL + LEFT ARROW
Move the cursor to the end of the line	END
Move the cursor to the beginning of the line	HOME
Indent text	CTRL + I

Selecting Text

To	Press
Select text from the cursor position one character to the left	SHIFT + LEFT ARROW
Select text from the cursor position one character to the right	SHIFT + RIGHT ARROW
Select text from the cursor position back to the beginning of the field	SHIFT + HOME
Select text from the cursor position to the end of the line	SHIFT + END
Select all text in the field	SHIFT + F8

Adding, Deleting and Copying Text

To	Press
Delete the character to the left of the cursor	BACKSPACE
Delete the character to the right of the cursor	DEL
Delete all text in the current line	ESC or CTRL + DEL
Cut selected text	CTRL + X
Copy selected text	CTRL + C
Paste copied or cut text	CTRL + V

Formatting Text

The font of the text you enter when you fill a field is controlled by the person who designed the form. You can format individual words and characters in bold, italic and underline, if required, by using the commands on the Format menu.

Note: Formatting inserts hidden characters into your text. These hidden characters may interfere with searches you do for specific data. Avoid formatting text in fields which you may search later.

Moving Between Fields

When you open a form in Filler, the cursor appears in the first field on the form. You fill a form by typing information in a field, then tabbing to the next field. When you press the TAB key, the cursor moves to the next field. The tabbing order depends on how your form was designed.

Use the following keys and commands to move from field to field.

To go to	Press
Next field	TAB
Previous field	SHIFT + TAB
Specific field	On the View menu, click **Go To Field**, then double click the field you want.

Note: To quickly display the Go To Field dialog, click the field name box on the status bar.

Filling a Table

Tables consist of rows and columns. Each field in a table is known as a cell. To move from cell to cell, press TAB. When you reach the last cell in a row, press TAB to move to the first column of the next row.

A table may have been designed to have a fixed number of rows, or it may be *scrollable*. If a table has a fixed number of rows, pressing TAB when the cursor is in the last cell of the last column moves the cursor to the next field.

If a table is scrollable, when you fill the last cell displayed on the screen, scroll bars appear to the right of the table, and FormFlow creates a new, blank row. With a scrollable table, you can create any number of rows of information, regardless of the number that appear on the screen at one time.

MISCELLANEOUS EXPENSES

Date	Description	Amount
Sept 14 1997	Couriers	$55.20
Sept 16 1997	Postage	$84.55
Sept 16 1997	Catering	$34.00
	TOTAL	**$252.75**

Scroll bars for navigating entries in a table

Filling Special Fields

FormFlow forms have different types of fields, each of which accepts certain types of information. When the cursor is in a field, its type is indicated with a symbol on the status bar.

Indicates the current field is a Date type.

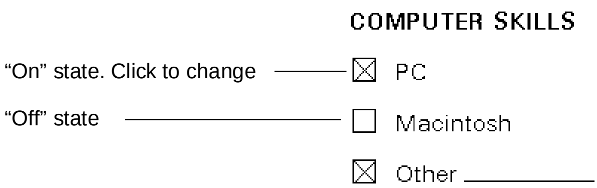
The following chart lists the types of fields, how to identify the field type, and the information you can enter.

Field type	Status bar indicator	Valid entries
General	A	Any
Fixed	#	Numbers
Percentage	#	Numbers
Currency	#	Numbers
Floating	#	Numbers
Page Number	#	Numbers
Check Mark	C	Symbols or text for “On”, “Off” and “Other” states
Time	T	Numbers, separators
Date	D	Numbers, text for months, separators
Graphic	G	Graphics, OLE objects
Bar Code	B	Numbers, text or other characters, depending on the bar code format
Signature	S	Text

Filling Check Mark Fields and Radio Buttons

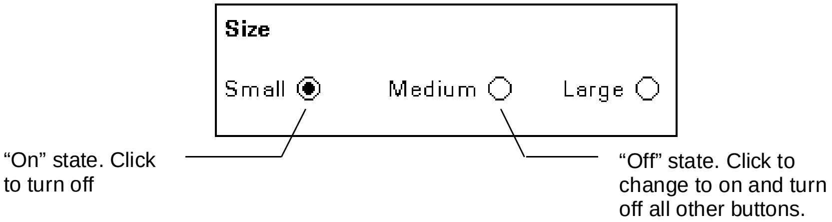
A check mark field operates as an On-Off switch, with either two or three possible states, or entries.

- A two-state check mark field is either on or off. When on, it appears as “Yes” or “Y”, or as a symbol such as a check mark, “X”, bullet or asterisk. When off, it appears as “No”, “N” or a blank.



- A three-state check mark field is similar to a two-state check mark field, except that it has a third option available. Typically this would be “Not available”.

Radio buttons are groups of check mark fields, with the “On” character indicated as a filled circle. You can have only one radio button on in a group. Turning on one button automatically turns all other buttons off.



➤To fill a check mark field

Do one of the following:

- Click in it. Click again to toggle to the available states.
- Tab to it, then press the space bar to cycle through the available states.

Filling Graphic Fields

There are two ways you can fill a graphic field:

- Select a file that is one of the types of graphics recognized by FormFlow.
- Copy a graphic to the Windows Clipboard, then paste it into the graphic field. You can also copy and paste information other than graphics, such as charts, graphs, and text.

➤To select a graphic file

Quick keys: CTRL + F6

1. On the Insert menu, click **Picture**. The Insert Picture dialog appears.
2. Specify the drive and directory in which the file you want to select is located.
3. Click the file name, then click **OK**.

When your cursor is still in the graphic field, FormFlow displays the path and file name of the graphic. When you tab to another field, the actual graphic appears.

➤To paste a graphic from the Clipboard

1. Using the program that created the original file you want to paste into your form, select and copy the portion of the picture or other information to the Clipboard.

2. Switch from the other program to FormFlow.

3. Tab to the graphic field.

Quick keys: CTRL + V

4. On the Edit menu, click **Paste**.

Note: To edit the information in the graphic field, double click it to start the program that created the original.

Filling Date and Time Fields

Date and time fields are usually designed to insert the current date and time automatically, using your computer's clock. These fields may or may not be editable.

➤To fill a date or time field

Type the date or time in the format expected.

For example, if the format of a date field is MM DD YY, you would type 09 15 97 for September 15, 1997.

Note: If you don't know the format the field requires, press F4 to display the Field Information dialog.

➤To insert the current date or time

Press CTRL + Z.

Filling Bar Code Fields

FormFlow supports eight bar code formats. Each has its own format and allowable characters.

➤To fill a bar code field

1. Type the bar code characters in the format expected.

   For example, UPC Type A bar codes consist entirely of numbers, and must be exactly 11 characters long.

2. Tab to another field to display the bar code.

Using Lookups

A lookup is a list of entries available for a field. Depending on how the form designer created the lookup, the list may be merely suggestions or common entries, or it may contain the only entries allowed when you fill the field.

A lookup is available for the current field if the letter "L" appears on the status bar, between the page number and the change indicator light.

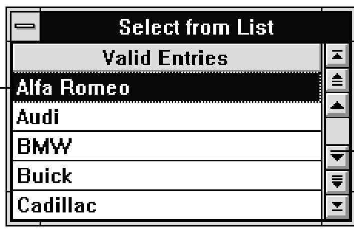
Indicates a lookup for the current field.

➤To use a lookup

1. Tab to the field containing the lookup.

Quick key: F3

2. On the View menu, click **Lookup**. The Select from List dialog appears.



Click an entry to insert it in the field.

Scroll to see more entries.

3. Click an entry to insert it in the field. If necessary, scroll down the list to display more entries.

Note: You can enlarge the lookup by dragging a side or corner.

➤To display all lookups automatically

1. On the Tools menu, click **Options**. The Options dialog appears.
2. Click the General tab.
3. In the Settings section, enable **Auto data lookup**, then click **OK**.

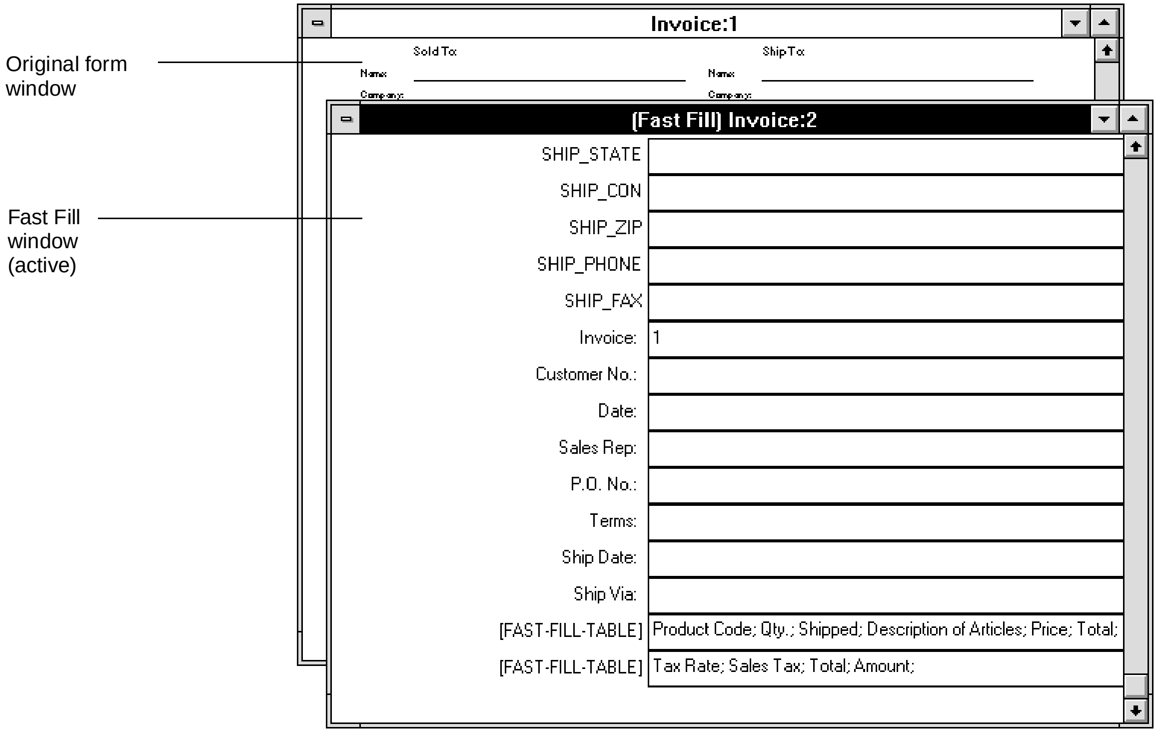
Each time you tab to or click in a field with a lookup, FormFlow displays the lookup associated with that field.

Using Fast Fill

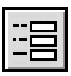
Fast Fill is a method of displaying your form for rapid data entry.
In Fast Fill, FormFlow replaces the normal version of your form with a stripped-down version, containing only field names and boxes for data entry.

Each field on the form appears as a box with an identifying label to the left of it. Field name labels in Fast Fill are either:

- the heading that appears on the actual form (if the heading and fill-in area occupy the same box
- the name of the field, as it appears on the status bar (if the fill-in area has no heading).



➤To use Fast Fill



Quick keys: CTRL + Y

1. Open the form you want to fill.
2. On the View menu, click **Fast Fill**. The form appears in a new window.
3. Fill the form as you normally would, by entering information, then tabbing to the next field. Each information in each field, as required.
4. On the View menu, click **Fast Fill** again to close the window.

Tip: You can display the regular and Fast Fill versions of the form in adjacent windows. On the Window menu, click **Arrange All**.

Filling Tables

Tables are indicated with the label [FAST-FILL-TABLE], and the associated field names appear in the box reserved for data entry. When you tab to this field, FormFlow opens a separate window for the table.

Column headings indicate the name of each column on the table. You can tab from cell to cell to fill the table. When you tab out of the last cell, FormFlow displays the previous Fast Fill window.

Filling Combs

Each cell in a comb has a separate box for data entry. If the comb is named SIZE, the cells in Fast Fill are named SIZE:1, SIZE:2, SIZE:3, and so on.

Filling Graphic Fields

Quick keys: CTRL + F6

To select the graphic you want to appear in a graphic field, click **Picture** on the Insert menu, then select a file.

FormFlow displays the full path and file name of the graphic, and information about the type of graphic scaling. When you exit from Fast Fill, the graphic appears in the field.

Filling Bar Code Fields

When you fill a bar code field, FormFlow displays the characters it will use to generate the bar code in the Fast Fill box. When you exit from Fast Fill, FormFlow displays the appropriate bar code on your form.

Updating Calculations

FormFlow derives values for some fields based on the values in other fields. These derived values are known as calculations. Commonly used calculations include subtotals, tax or discount percentages, and grand totals.

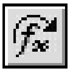
You can set up FormFlow to make these calculations automatically, or you can recalculate them as required. Having FormFlow make calculations automatically ensures that calculated values on the form are always correct. Calculating manually may reduce the time it takes to fill a form, because FormFlow does not have to recalculate values every time you fill a field.

➤To calculate values automatically

Quick keys: CTRL + A

On the Tools menu, click **Auto Recalc**.

Auto Recalc is a toggle. To turn it off, click the command again.



Quick key: F9

➤To calculate values

On the Tools menu, click **Recalculate**.

Note: FormFlow does not automatically recalculate fields with certain characteristics. For example, if you overwrite a calculated field, FormFlow assumes you intended to do so. To recalculate all fields, press CTRL + F9.

Signing a Form Electronically

A FormFlow form can have signature fields that store an electronic signature. If you have been assigned a security passphrase, you can:

- sign forms electronically—to indicate authorization in the same manner as a handwritten signature
- verify that other users' signatures are valid, and that data locked by those other signatures is unchanged.

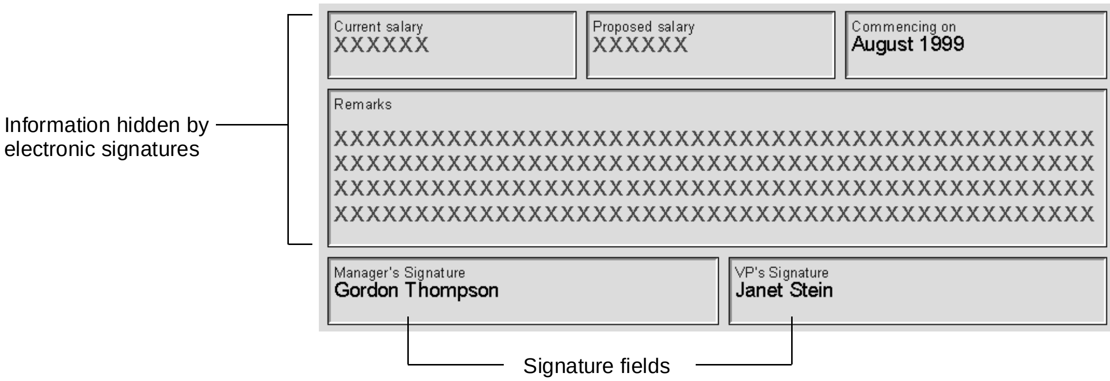
➤To sign a field

1. Tab to the signature field.
2. Type your security passphrase in the field, then press TAB. The Security User Login dialog appears.
3. Type your user name in the **User Name** field, then press TAB. Your user name was assigned to you by your security administrator.
4. Specify the path to your security profile file. If your security profile file is stored on a floppy disk, insert the disk in your disk drive.
5. Click **OK**.
6. Your name appears in the signature field.

Depending on how a form is designed, signing a form may set up some or all of the following conditions:

- The signature may be protected, such that only the original signer can unsign that form record.
- The signature may cause other fields on the form to be locked, so that other users cannot modify the information.

- Fields locked by a signature may also be hidden. Once the form is signed, the information in those fields is hidden behind rows of X's.

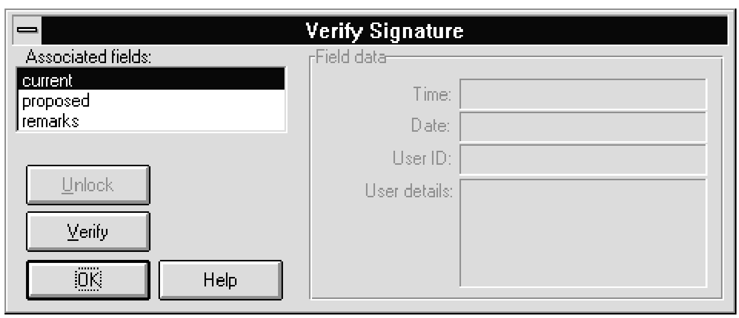


➤To verify an electronic signature

1. Tab to the signature field. The signature disappears.
2. On the Tools menu, click **Security**, then **Log In**. The Security User Login dialog appears.
3. Type your passphrase, then press TAB.
4. Type your user name, then press TAB. Your user name was assigned to you by your security administrator.
5. Specify the path to your security profile file. If your security profile file is stored on a floppy disk, insert the disk in your disk drive.
6. Click **OK**.

Quick key: F6

7. On the Tools menu, click **Verify Signature**. The Verify Signature dialog appears.

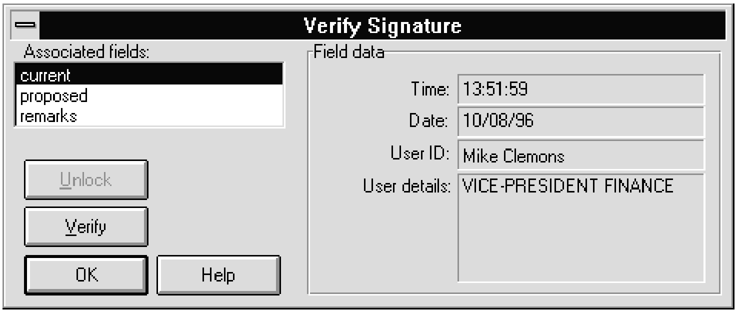


8. Click **Verify**.

9. If the signature and associated information is valid and unchanged, the following message appears:

   Signature verification...
   Signature and data are valid.

10. Click **OK** to acknowledge the message. FormFlow displays information about the signer in the Field data area of the Verify Signature dialog.



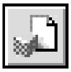
If the signature or associated data has been changed since the record was originally signed, the following message appears:

The signature does not match the data

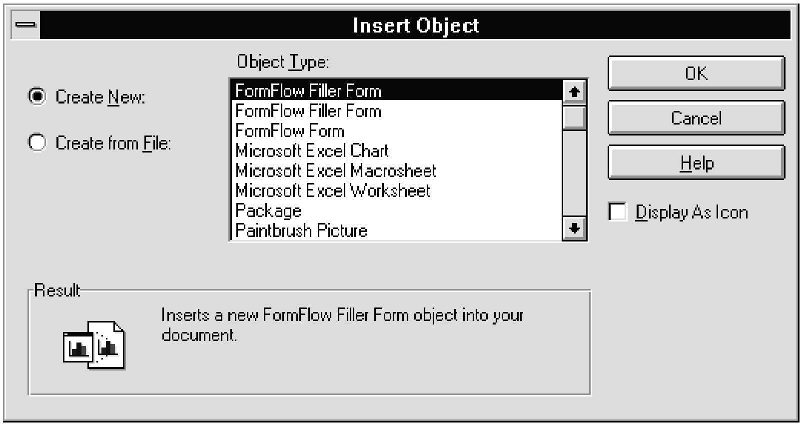
Inserting an OLE Object

You can insert information from another Windows program as a graphic in a graphic fill field on your form.

➤To insert an existing object



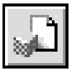
1. Tab to or click in the field.
2. On the Insert menu, click **Object**. The Insert Object dialog appears, displaying the programs available to you.



3. Click **Create from File**.
4. Click **Browse**, then select the file you want to insert.
5. If you want changes to the original object to be reflected in your form, click **Link**. Otherwise, FormFlow creates a separate copy of the object, which you can edit independently of the original.
6. Click **OK** to insert the object.

To edit the object, double click it to launch the program that created it.

➤To insert a new object



1. Tab to or click in the field.

2. On the Insert menu, click **Object**. The Insert Object dialog appears.

3. Click **Create New**.

4. In the Object Type box, click the program you want to use to create the object, then click **OK**.

5. The program you selected starts up. Depending on the program you chose, you may see the actual program, or the program's menus within FormFlow.

6. Create the object you want to appear in the field.

7. On the program's File menu, click **Exit and return to.** The program prompts you to save your changes.

8. Click **Yes**, or its equivalent. The object appears in your form field.

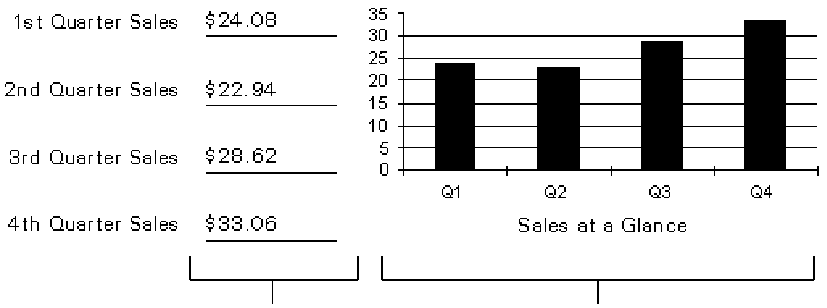
To edit the object, double click it to launch the program that created it.

Linking to Information in Other Programs

FormFlow enables you to link a graphic field on your form to information in another Windows program. When the information in the other program is updated, the results are automatically reflected in FormFlow.

For example, you could link the information on your form to an Excel spreadsheet. As you enter new information into the form fields, the spreadsheet is automatically updated.

Using the information on the spreadsheet to create a graph, you could in turn link the graph back to your form, by pasting it into a graphic field, as illustrated below.



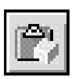
Currency fields. Data is linked to an Excel spreadsheet.

Graphic field, linked to Excel graph of sales figures, created from spreadsheet of sales figures.

If you change the numbers on the form, the graph also changes, because the form and the spreadsheet used to create the graph are linked.

➤To link to information in other programs

1. Tab to or click in the field.
2. Start the program that created the information you want to insert in your form.
3. Copy the information—picture, chart, text—to the Clipboard.
4. Switch back to FormFlow.



5. On the Edit menu, click **Paste Special**. The Paste Special dialog appears.

6. Click **Paste Link**.

7. Click **OK**. The object appears in your form field.

To edit the object, double click it to launch the program that created it.

Note: If the Paste Special command is grayed, the program from which you copied the information does not support OLE. You can still paste the object, but changes to the original are not reflected in your form.

Spell Checking Text

FormFlow includes a spell checker to ensure that all the data you enter in your form is spelled correctly. You can check the entire record or individual form fields.

➤To spell check a field or record

Quick keys: CTRL + F10

1. Tab to or click in the field you want to check.

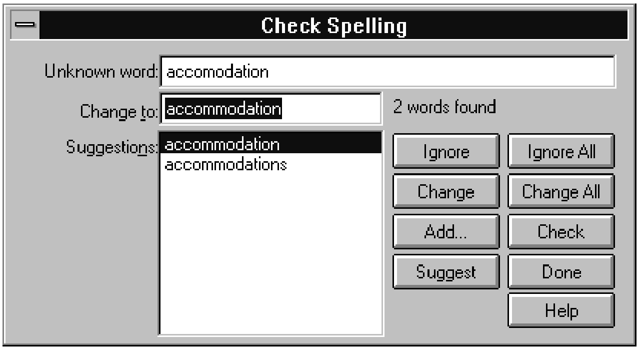
2. On the Tools menu, click **Check Spelling**. FormFlow compares the text in the field with the entries in two dictionaries: the default dictionary and your custom user dictionary.
   - If everything in the field matches something in one of the dictionaries, a message appears:

     Spell check for current field complete. Continue checking for the rest of the form?

     To check other fields, click **Yes**.

     To end spell checking, click **No**.

   - If FormFlow locates a word not in either dictionary, it highlights the word and displays the following dialog.



Note: An unknown word is not necessarily misspelled. FormFlow may flag proper names or specialized or technical terms. If you use such words frequently, add them to your custom dictionary.

FormFlow displays the word it wants you to check in the **Unknown Word** field. If you have set up FormFlow to display a list of possible replacements, these words appear in the **Suggestions** list.

The number of possible replacements is shown opposite the **Change to** field. If there are more than 10, scroll bars appear on the Suggestions list.

The following table describes the options for handling unknown words.

Click this button...	To do this
Ignore	Skip the unknown word. If the word occurs again, FormFlow flags it again.
Ignore All	Skip all occurrences of the unknown word. If the word occurs again, FormFlow ignores it.
Change	Change the unknown word to a word on the Suggestions list. To replace the unknown word, click the word on the list you want, then click Change.
Change All	Change all occurrences of the unknown word to a word on the Suggestions list. To replace the unknown word, click the word on the list you want, then click Change All. Any further occurrences of the same word are also replaced.
Add	Add the unknown word to your custom dictionary. If the word occurs again, FormFlow accepts it.

When FormFlow finds another unknown word, it highlights it. If the word is on a portion of the form page not currently displayed, it scrolls the screen to display the field. In multiple-page forms, FormFlow moves automatically from page to page to spell check the text in all fields.

When spell checking of the current record is complete, FormFlow displays the message:

Spell check complete.

Note: During a spell check, FormFlow skips fields if they:

- do not contain text
- use calculations to derive their values
- are non-overwritable
- have mandatory lookups.

5

Working with Data

This chapter describes how to work with data in FormFlow™ Filler. It covers the following topics:

- opening and saving a database
- adding, updating and deleting database records
- committing and rolling back changes to a SQL table
- locating and displaying records
- selecting and creating database indexes.

Working with Databases

Before you can add new records or view existing records in a form, you must open a database.

Opening a Database

You can open a database in either of two ways:

- Open a database for the current session only. When you finish the current session, and close the form, there is no further association between the form and the database. To use the same database in subsequent sessions, you must repeat the process of opening the database.

See “Defining a Default Database” on page 5-7.

- Open a database and define it as the default database for the form. When you finish the current session, and close the form, FormFlow retains the association between the form and the database. The next time you open the form, FormFlow automatically opens the default database.

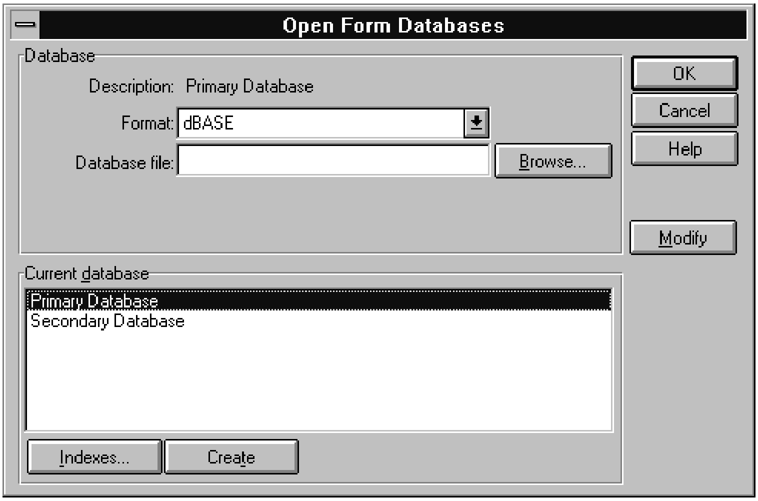
Note: The **Open Data** command is grayed (unavailable) if the current form’s fill options have been limited so that you can fill it in only with a pre-defined default database.

➤To open a database

1. Open the form you want to work with.

Quick keys: CTRL + F

2. On the Data menu, click **Open Data**. The Open Form Databases dialog appears.



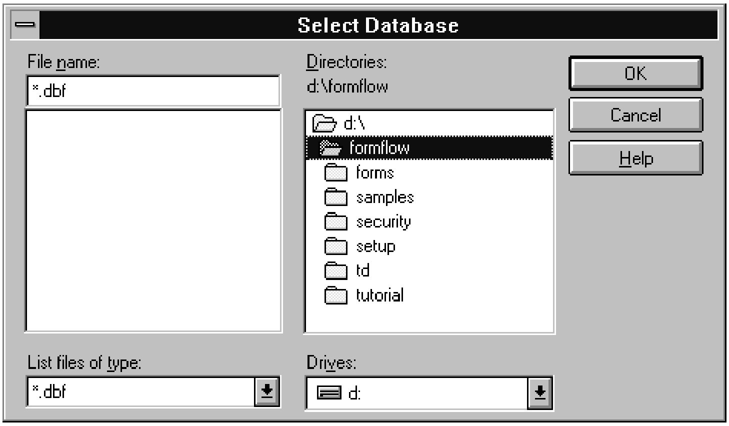
3. Click in the **Format** box, scroll through the list of database formats, then click the format you want. If you select SQL, Lotus Notes or ODBC format, the Database area of the dialog changes as described in the following table.

Format	New fields	Comments	New buttons
SQL	Table Name Server Name Database	Replaces Database File field. Except DBM, where the server (that is, the remote node name) is defined in the catalog entry for the database. Except Oracle, which has only one database per server.	Filter Options
Lotus Notes	Notes Form Server Name Database	Replaces Database File field.	
ODBC	Table Name	Replaces Database File field.	Filter Options

➤To open a conventional database

1. If you know the path and file name of the database file you want to open, type this in the **Database file** field, then continue at step #4.

2. If you do not know the path and filename of the database file you want to open, click the **Browse** button to the right of the field. The Select Database dialog appears.



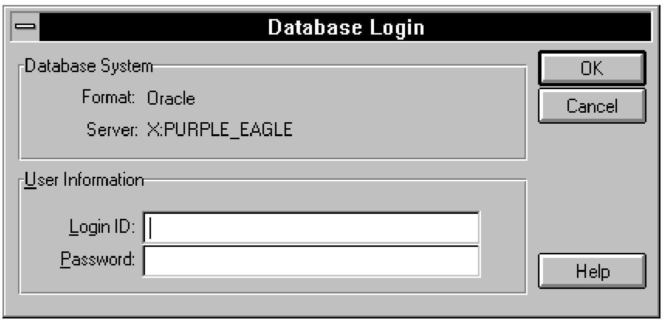
3. Specify the drive, directory and file name of the database file you want to open, then click **OK** to return to the Open Form Databases dialog.

4. In the Open Form Databases dialog, click **OK**. FormFlow opens the database.

➤To open and log in to a SQL table

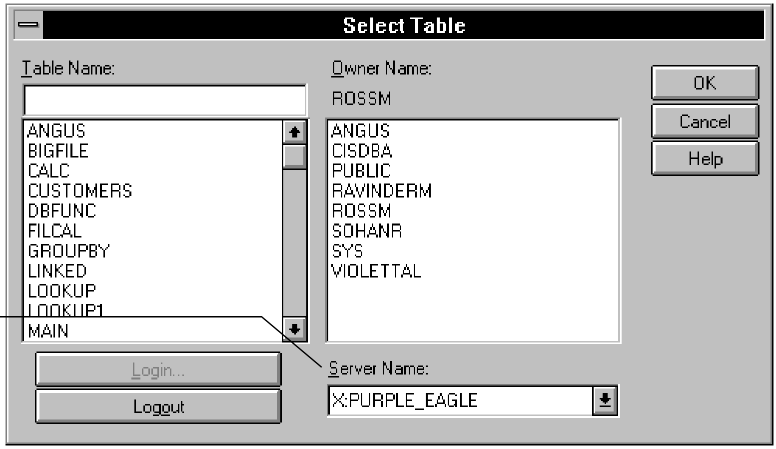
1. In the Open Form Databases dialog, click the **Browse** button to the right of the **Table name** field. The Select Table dialog appears.

2. Click **Login**. The Database Login dialog appears.



3. Type your **Login ID** and **Password**, then click **OK** to return to the Select Table dialog.

Once you have logged in, the Select Table dialog shows the tables you are authorized to select and attach to your form.

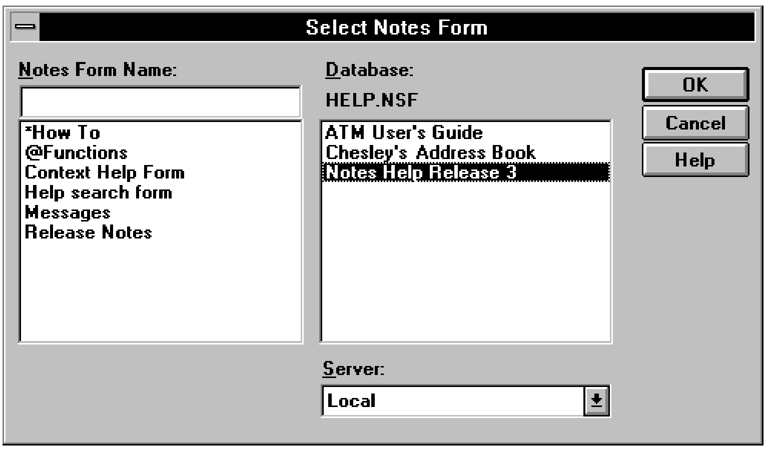


4. Select a **Table name**, then click **OK** to return to the Open Form Databases dialog.

5. Click **OK**. FormFlow opens the table.

➤To select a Lotus Notes form

1. In the Open Form Databases dialog, click **Browse**. The Select Notes Form dialog appears.



2. In the Select Notes Form dialog, do the following:
   - Select the **Server** that contains the database you want to use.
   - If you select a form from a server, Lotus Notes needs your password to access your ID file. Type your password in the Lotus Notes dialog box, then click **OK**.
   - Select the **Database** that you want to use.
   - Select a **Notes Form Name** from the list displayed, then click **OK** to return to the Open Form Databases dialog.

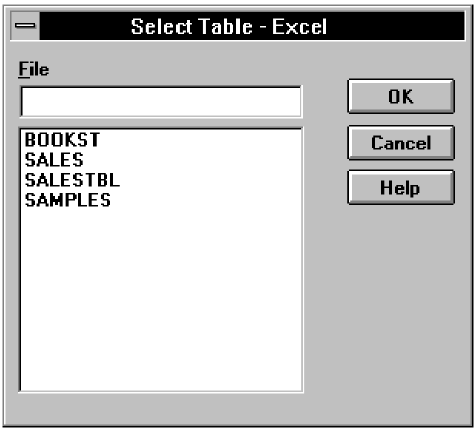
3. In the Open Form Databases dialog, click **OK**. FormFlow opens the Notes form.

Note: To enter data in a Lotus Notes database, you must have at least Editor access. For more information, consult your database administrator.

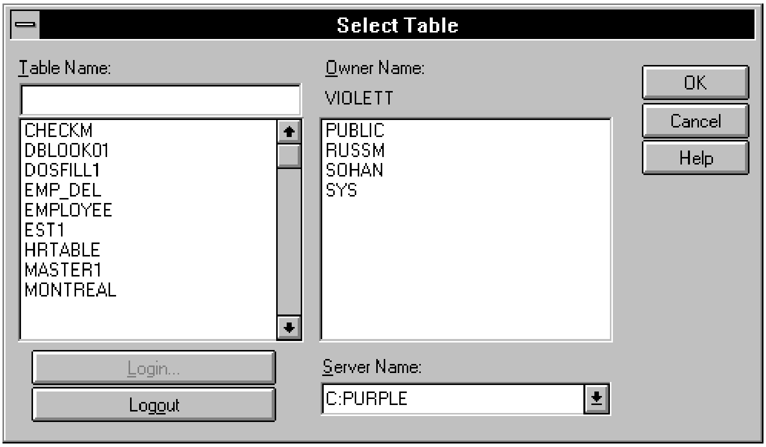
➤To select a database using OBDC access

1. In the Open Form Databases dialog, click **Browse**. The Select Table dialog appears. The appearance of the Select Table dialog depends on whether your ODBC driver is single-tier or multiple-tier.

2. For a single-tier driver, select the table that you want to use, then click **OK**.



3. For a multiple-tier driver, you may have to log on to the server in order to access the database. Do the following:
   - If requested, type your **Server Name**, **User name** and **Password** in the Logon dialog, then click **OK** to return to the Select Table dialog.
   - Select the table that you want to use, then click **OK**.



4. In the Open Form Databases dialog, click **OK**. FormFlow opens the database.

Defining a Default Database

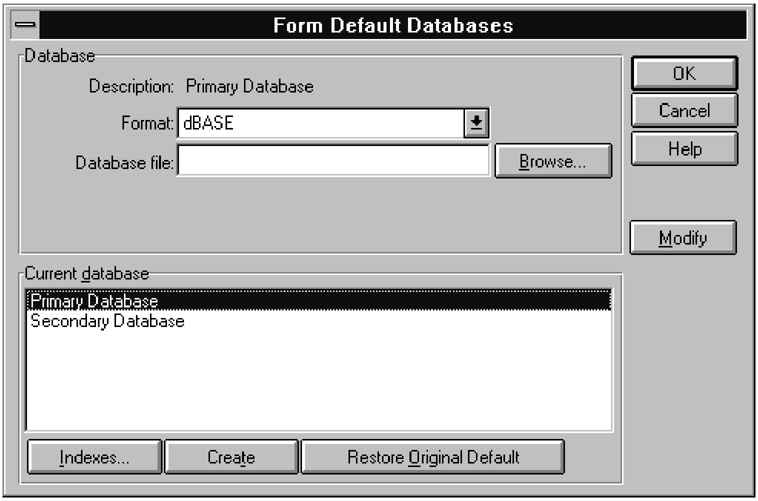
When you define a default database for a form, FormFlow retains the association between the form and the database. Every time you open the form, FormFlow automatically opens the default database.

The procedure for selecting a default database is identical to the procedure for selecting a non-default database, except that you are working from the Form Default Databases dialog.

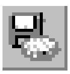
➤To define a default database

1. Open the form you want to work with.

2. On the Data menu, click **Default Data**. The Form Default Databases dialog appears.



3. Follow the steps in the procedure “To open a database”, earlier in this chapter.

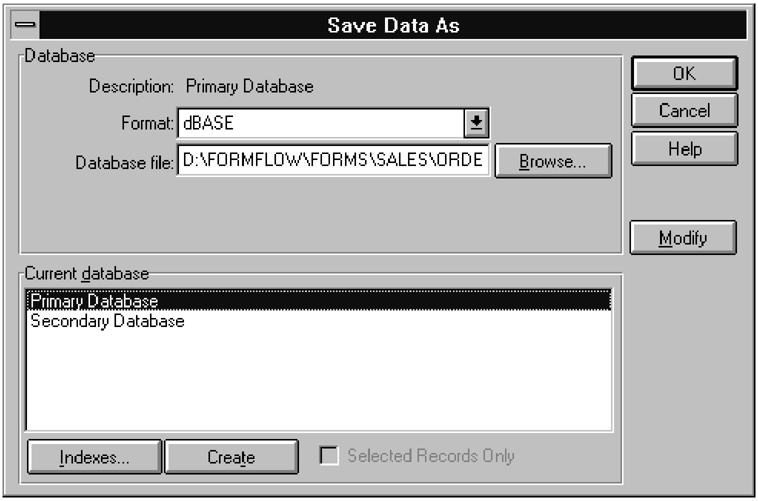


Saving a Database

When you save a database with a different file name or a different path, you create a copy of the original database in the new location. You can then modify and save data in the new database without altering the original file.

1. Open the form with the database you want to modify.

2. On the Data menu, click **Save Data As**. The Save Data As dialog appears.



3. In the Current database list, click the database you want to save to a different name.

4. Click in the **Database file** box, type the new path and file name, then click **OK**.

5. If the database does not exist, a confirmation dialog appears, to verify that you want to create it. Click **Yes** to create the new database. An information dialog appears, showing details of the newly created database.

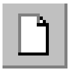
6. A further dialog appears, asking which records you want to save to the new database. Click either of the following:
   - **Current** – to save only the current record to the new database
   - **All records** – to save all existing records to the new database.

Note: To save a copy of a database on a network drive, you must have write access. If FormFlow cannot create a database for you, check that you have write access on the drive on which you want to save the database. You also need write access on the drive on which the form is stored, because FormFlow needs to create a file in that directory when it creates a new default database.

Working with Records

Creating a New Record

When you first open a form that has existing records in the attached database(s), FormFlow displays one of the existing records. Before you begin filling, you must create a new, blank record.



➤To create a new record

On the File menu, click **New**. A blank copy of the form appears, ready for you to fill.

Quick keys: Ctrl + N

Adding a Filled Record

Once you have filled a record, you must save it to a database before you can begin to fill the next record.

➤To add a filled record

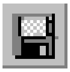
1. Fill the fields on the record.

Quick keys: Ctrl + S

2. On the Data menu, click **Add Record**. The filled record is added to the database, and a new, blank copy of the form appears, ready for you to begin filling the next record.

Updating a Modified Record

You can modify an existing record at any time. Once you have made the changes, you must save the modified record to the database.



➤To update a modified record

1. Make the necessary changes to the fields on the record.

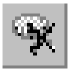
Quick keys: Ctrl + U

2. On the Data menu, click **Update Record**. The modified record is saved to the database.

Note: You can also update a record using the **Save** command on the File menu. If you have not yet saved the record, clicking **Update Record** or **Save** has the same effect as using the **Add Record** command.

Deleting a Record

You can delete an existing record from a database.



➤**To delete a record**

1. Display the record you want to delete.

Quick keys: CTRL + K

2. On the Data menu, click **Delete Record**.

The deletion process varies, depending on your database format. The following table summarizes the different processes.

Database format	How deleted records are handled
ASCII	A dialog appears, asking you to confirm the deletion. If you confirm, FormFlow first makes a copy of the file, before the deletion, and saves it with the extension .BAK. FormFlow then creates a new file, using the original file name and .FIL extension, from which the selected record is deleted.
dBASE	Records are flagged for deletion, but are not finally deleted until you purge deleted records.
Paradox	A dialog appears, asking you to confirm the deletion. If you confirm, the current record is deleted.
SQL	A dialog appears, asking you to confirm the deletion. If you confirm, the current record is deleted. Deletions from a SQL table are not final until you commit changes.

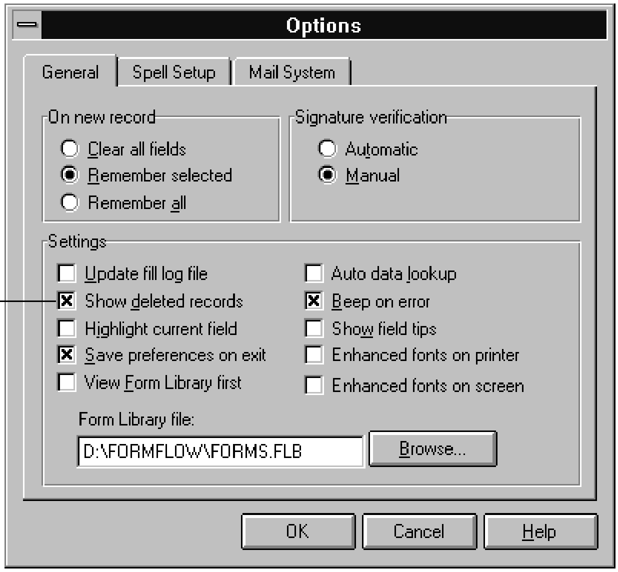
Purging Deleted dBASE Records

When you delete a record from a dBASE database, it remains in the file until you purge deleted records. You can turn the display of deleted dBASE records on or off.

➤To view deleted dBASE records

1. On the Tools menu, click **Options**. The Options dialog appears.

Toggle display of deleted dBASE records



2. Enable **Show deleted records**.

Tip: When you view a deleted dBASE record, a symbol—with the same icon as the Delete Record button—appears on the status bar.

➤To purge deleted dBASE records

1. On the Data menu, click **Purge Deleted Records**. A dialog appears, asking you to confirm the deletion.

2. Click **Yes**. The deleted records are permanently removed from the database.

Committing and Rolling Back SQL Changes

When you make changes to records in a SQL table—whether you are adding, updating or deleting records—those changes are not permanent until you commit the changes.

After making changes to a form with an attached SQL table, you must either commit or rollback the changes before you can close a form, or exit FormFlow. In addition, while you are working with the form, you can commit or rollback changes at any time.

Note: If you do not see any messages about committing or rolling back changes, it means that your form has been designed to do this automatically, whenever you save a record.

➤To commit changes to a SQL table

On the Data menu, click **Commit All Changes**.

➤To rollback changes to a SQL table

On the Data menu, click **Rollback All Changes**.

Locating and Displaying Records

You can view the existing records in the database attached to a form in the following ways:

- stepping through the records, one at a time
- going to the first or last record in the database
- going to a specific record number
- searching for specific records.

Moving Through Records

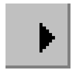
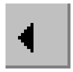
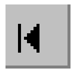
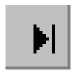
The sequence of records in a database is controlled by the sorting index. If there is no sorting index, records are sequenced in the order in which they are created. Otherwise, when you change from one sorting index to another, you change the sequence of records.

For example, if you sort an employee file alphabetically by department, you would see the employees in the Accounting department, then Human Resources, Marketing, Production and finally Research. If you sort the same file by employee last name, or by hire date, you would see a different sequence.

See “Working with Indexes” on page 5-18.

When you move through records in an indexed database, the sorting index determines the order of the records you are moving through.

The following table explains the different methods of moving through records.

To go to	Menu command	Button	Quick key
Next record	On the Locate menu, click **Next**		CTRL + PGDN
Previous record	On the Locate menu, click **Previous**		CTRL + PGUP
First record	On the Locate menu, click **First**		CTRL + HOME
Last record	On the Locate menu, click **Last**		CTRL + END

➤To go to a specific record

Quick key: CTRL + G

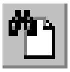
1. On the Locate menu, click **Go To Record**. The Go To Record dialog appears.

2. Type the number of the record you want to go to, then click **OK**. The specified record appears.

Searching Records

FormFlow provides three methods to help you find records that match the criteria you specify:

- **Query by form** – on a blank form, you type the value(s) you want to match in the field(s) you want to search
- **Search on index field** – search for a match in one or more of the fields in an existing index
- **Search on expression** – search for a match in any field (indexed or not) with the boolean expression you create.



Quick key: CTRL + B

➤To perform a query by form

1. Open the form and database you want to search.

2. On the Locate menu, click **Search**, then click **Query By Form**. A blank copy of the form appears, and a new toolbar is added.

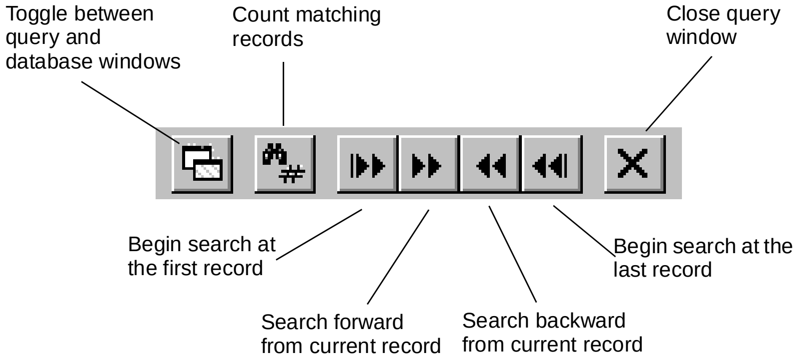
3. Click in or tab to the field on which you want to query, then double click in the field to display the list of operators:
   - equal to (=)
   - less than (<)
   - less than or equal to (<=)
   - greater than (>)
   - greater than or equal to (>=)
   - not equal to (<>).

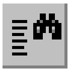
4. Click the operator you want to use, then type the value you want to search for.

5. Repeat step #3 and step #4 for any additional fields you want to use in the query.

6. Use the search toolbar buttons to proceed with your search in any of the following ways:
   - search forward from the beginning of the database
   - search forward from the current record
   - search backward from the current record
   - search backward from the end of the database
   - count the number of matching records
   - toggle back and forth, between the query window and the database window
   - close the query window and return to the database window.

Note: When the Query by Form window is active, the status bar shows [Query Form] in the area normally reserved for the record count. In addition, all commands on the Data menu are grayed.

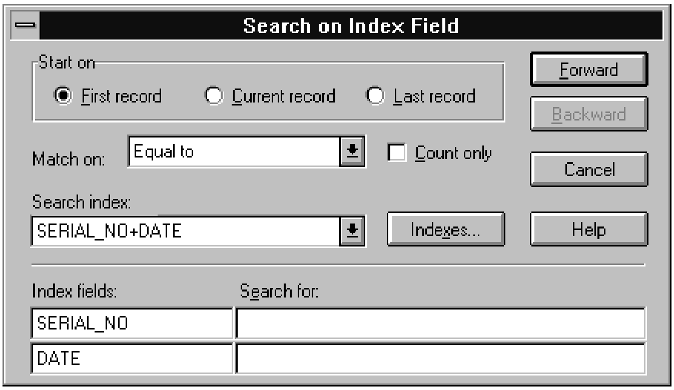




➤To perform a search on index

1. Open the form and database you want to search.

2. On the Locate menu, click **Search**, then click **Search on Index Field**. The Search on Index Field dialog appears.



3. In the Start on section, specify the starting point for your search by enabling one of the following options:
   - First record
   - Current record
   - Last record.

4. Click in the **Match on** box, then, to specify the operator you want to use, click one of the following:
   - equal to (=)
   - less than (<)
   - less than or equal to (<=)

- greater than (>)
- greater than or equal to (>=)
- not equal to (<>).

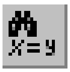
See “Working with Indexes” on page 5-18.

5. Click in the **Search index** box, then click the index you want to use for the search. The associated index fields appear at the bottom of the dialog.

6. For every index field that you want to search on, click in the **Search for** box to the right of the index field, then type the value you want to search for.

7. If you want to count the matching records, enable **Count only**.

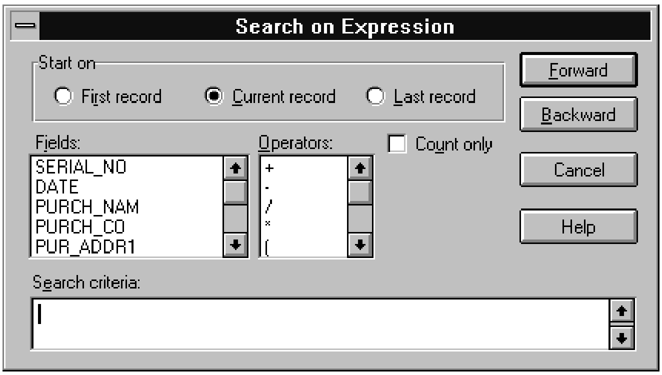
8. To begin the search, click **Forward** or **Backward**.



➤To perform a search on expression

1. Open the form and database you want to search.

2. On the Locate menu, click **Search**, then click **Search on Expression**. The Search on Expression dialog appears.



3. In the Start on section, specify the starting point for your search by enabling one of the following options:
   - First record
   - Current record
   - Last record.

4. To construct the search criteria, do either or a combination of the following:

- In the **Fields** list and the **Operators** list, double click a field name, then double click an operator, to add them to the Search criteria.
- Type your search expression directly in the Search criteria box.

5. If you want to count the matching records, enable **Count only**.

6. To begin the search, click **Forward** or **Backward**.

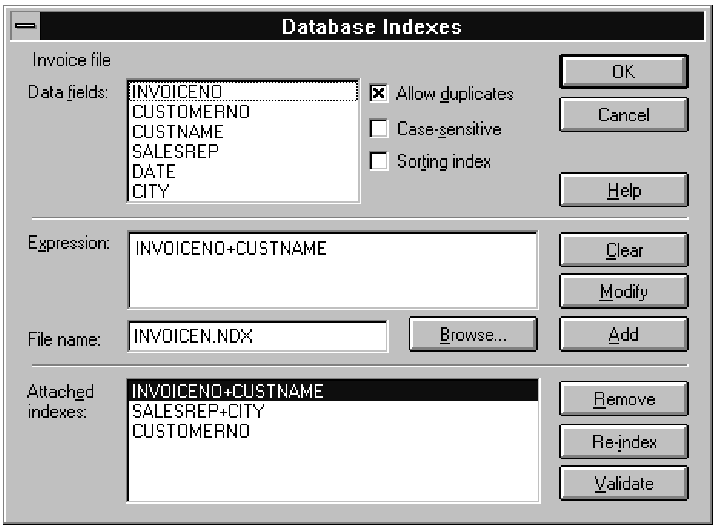
Note: In the search expression, field names must be enclosed in square brackets, and text strings must be enclosed in quotes.

Working with Indexes

The sorting index determines the sequence in which you view existing database records attached to your form. Although you can have multiple indexes attached to a database, only one index at a time can be defined as the sorting index.

➤To select a sorting index

1. On the Data menu, click **Select Index**. The Database Indexes dialog appears.

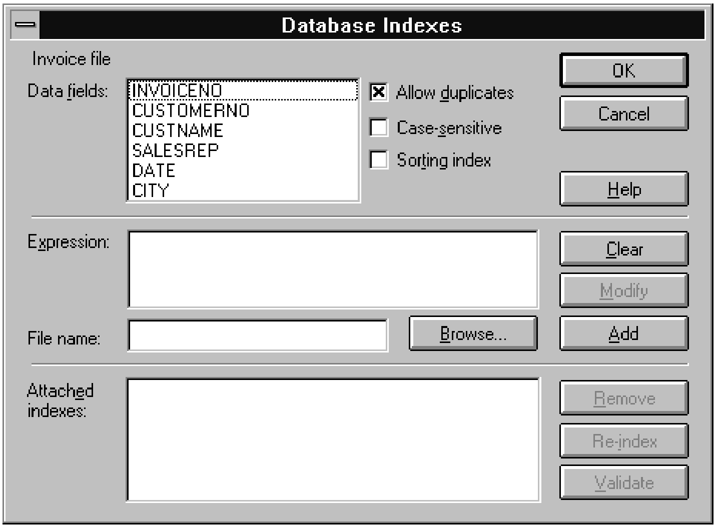


2. Click **Clear** to blank the **Expression** field.

3. In the **Attached indexes** list, click the expression you want to select as the sorting index.

➤To add a new index

1. On the Data menu, click **Select Index**. The Database Indexes dialog appears.



2. Click **Clear** to blank the **Case sensitive**, **Sorting index**, **Expression** and **File name** check boxes and fields.

3. To create a new index expression, do either of the following:
   - Scroll through the list of **Data fields** and double click each field that you want to add to the index **Expression**.
   - Type field names, joined by a plus sign (+), directly in the **Expression** field.

4. If you are defining an index for a dBASE database, do the following:
   - to attach an existing index, click **Browse** and use the Select Index dialog to locate and select the index.
   - enable or disable **Allow duplicates**.

Tip: If you enable **Allow duplicates**, you can enter the same data, in a field included in an index expression, on multiple records.

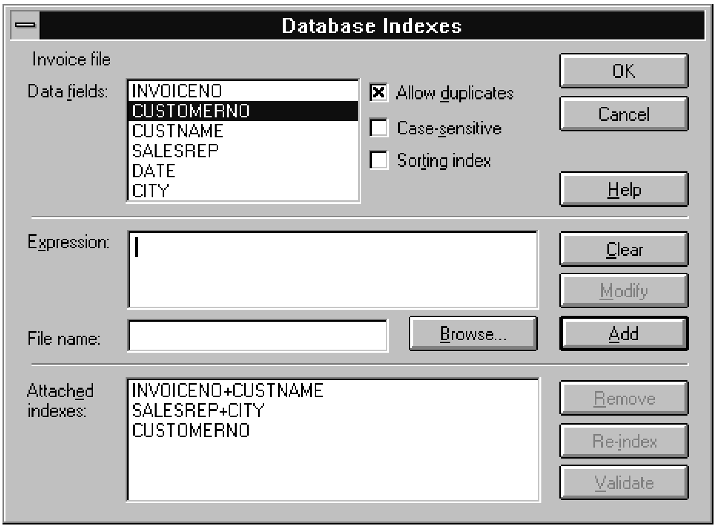
If you disable **Allow duplicates**, the data in an indexed field must be unique.

For example, you might want to index an employee file by Last Name and by Employee Number. Typically, an employee number must be unique, but several employees may have the same last name, so you would disable **Allow duplicates** for the employee number index, but enable it for the last name index.

5. If you are defining an index for a dBASE or Paradox database, enable **Case sensitive** if you want to sort uppercase data before lowercase data.

6. Enable **Sorting index**.

7. Click **Add**. The index expressions appears in the **Attached indexes** list at the bottom of the dialog.



6

Sending and Receiving Forms

This chapter describes how to send and receive forms using FormFlow™ Filler. It covers:

- sending forms
- packaging forms
- receiving forms
- processing workflow tasks.

Sending Forms

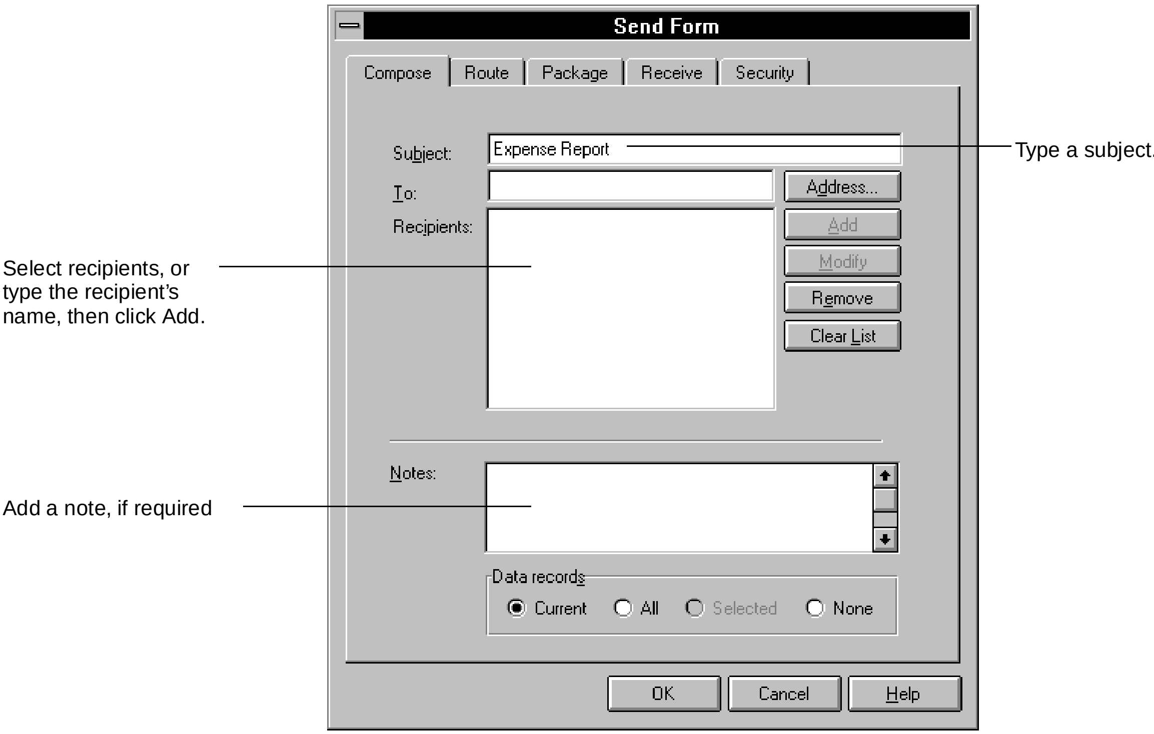
You can send a form and its associated data to another person or group using your mail system as the transport mechanism. Sending forms via email is a fast and convenient way to get the form from your desk to the next person who needs to see it.

When you send a form, FormFlow places the form and all the files associated with it inside a *form package*, which it attaches to a mail message to the recipients. Recipients can open the form package and view the form from within FormFlow, or from their mail system.

➤To send a form

1. Open the form you want to send. If you want to send a particular record, display that record.
2. On the File menu, click **Send Form**.

3. If you are not logged into your mail system, the mail system login dialog appears. Type your user name and password, then click **OK**. The Send Form dialog appears.



4. Edit the subject of the form you are sending, if required. The default subject is the form's title (if the form designer created one) or the form's file name if the form has no title.

5. Address the form. There are two ways you can add recipients:
   - Click **Address**. Your mail system's standard Address dialog appears. Choose the names of the people you want to send the form to, then close the dialog. The names you choose appear on the Recipients list.
   - Type a recipient name in the **To** field, then click **Add**. Repeat until all the names you want appear on the Recipients list.

6. In the **Notes** field, add a note to accompany the form, as required.

7. Select which records you want to send with the form.

8. Specify other options as appropriate. Click the tabs at the top of the dialog to display the other options.

9. Click **Send** to send the form.

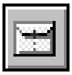
Note: For information about options on the Send Form dialog, see the online help. The options available to you on this dialog are controlled by the designer of the form, and can vary from form to form.

Packaging Forms

You can package a form, its associated files, and other selected files in a single file known as a *form package*. By condensing all of a form's related files into a single file, the task of moving the form from one location to another—either by electronic mail, via floppy disk, or using the DOS or Windows File Manager commands—is made easier. You need only move a single file, and the paths that reference the form's related files are updated to reflect the new location.

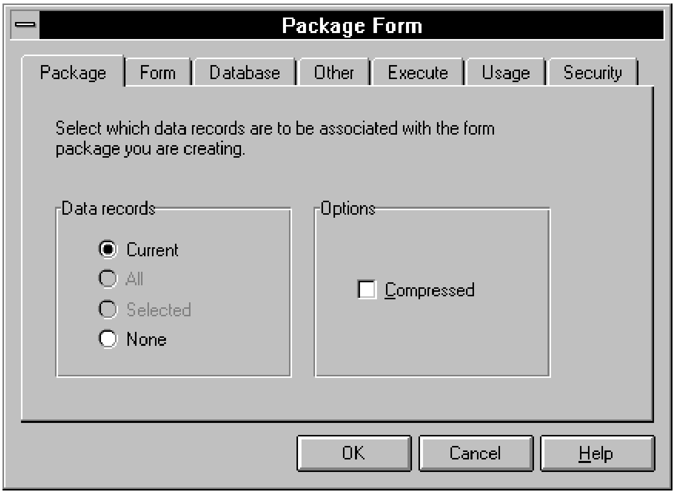
Creating a form package is useful when you want to make a backup copy of a form and its related files, or if you need to move a form to another computer that is not connected to a network, and so must transfer files on a floppy disk.

➤To create a form package



1. Open the form you want to package. If you want to package a particular record, display that record.

2. On the Tools menu, click **Package Form**. The Package Form dialog appears.



3. Specify what you want to include in the package. Click each tab on the dialog and specify package options.

4. Click **OK**. The Save Form Package As dialog appears.

5. Specify the drive and directory where you want to save the file.

6. In the **File name** field, type the name you want to use for the package, then click **OK**.

Note: To open a form package, use the **Open** command on the File menu, as you would to open any form or form application. If File Packager is defined as your mail system, you can also locate and open form packages using the **Receive Form** command on the File menu.

Receiving Forms

You can view and process forms sent to you via email by another FormFlow user. Forms arrive in a *form package*, attached to an email message. When you open the package, the form appears in your FormFlow workspace.

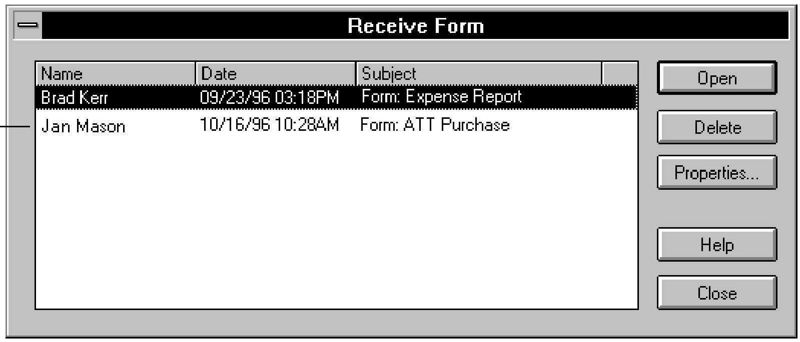
Once you have opened the form package and filled or modified the form, you may be able to forward it to the next recipient, return it to the originator, or save the contents of the form package to your hard disk. The options available to you are controlled by the designer of the form.

➤To receive a form

1. On the File menu, click **Receive Form**.

2. If you are not logged into your mail system, the mail system login dialog appears. Type your user name and password, then click **OK**. The Receive Form dialog appears.

Click an item, then click Open to open the form.



3. To open a form package, do either of the following:
   - Click the form to highlight it, then click the **Open** button.
   - Double click the form.

The form package opens in your workspace.

Notes:
- You can also open a form package from your mail system by double clicking the attachment in the mail message.
- Only those packages in your mail system inbox are displayed in the Receive Form dialog. If you move a form package to a folder or archive in your mail system, you cannot view the package in the Receive Form dialog.

Displaying the Contents of Packages

A form package normally consists of at least a form and the data associated with it. When you receive a form package, it may contain other files you require. For example, a form package might contain a text document, additional databases, a spreadsheet, and so on.

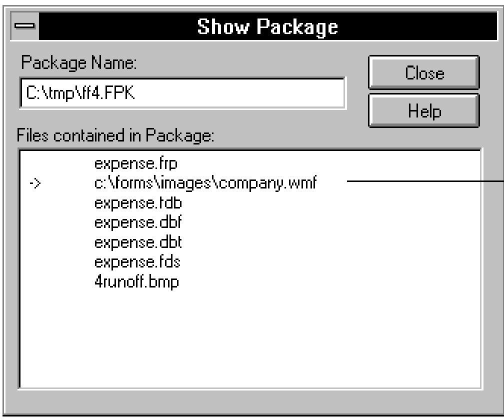
You can display the contents of a package you have opened if:

- the form has been designed it to allow you to unpack it
- you have not already unpacked the form—that is, the form package still exists as a single .FPK file.

➤To display the contents of a package

1. Open the package in your workspace.

2. On the File menu, click **Show Package**. The Show Package dialog appears.



Files contained in the form package are listed. Files preceded by an arrow are referenced.

FormFlow displays the list of files associated with the package. Files included in the package are shown by only their file names. Referenced files (files used by the form but not included in the package) are indicated with an arrow, together with the full path to the file.

Note: If the Show Package command does not appear on your File menu, the designer of the form has not given you permission to unpack the package.

Unpacking Packages

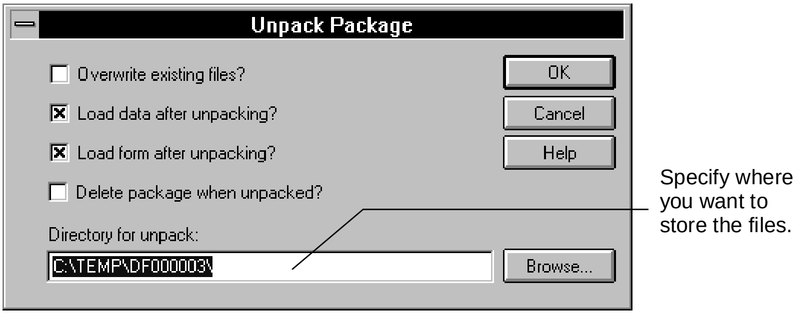
To extract the files in a form package, you must first unpack, or disassemble the single .FPK into its original components. You can then save the files to your hard drive and edit them as required.

Your ability to unpack a package is determined by the form designer.

➤To unpack a package

1. Open the package in your workspace.

2. On the File menu, click **Unpack Package**. The Unpack Package dialog appears.



3. Specify the drive and directory where you want to save the unpacked files.

4. Specify other options, as required.

5. Click **OK** to unpack the package.

Note: If the Unpack Package command does not appear on your File menu, the form designer has not given you permission to unpack the package, or you are using a custom form or form application.

Updating Packages

When you edit a form package you have received, FormFlow actually maintains two separate versions of the package: the original, attached to the mail message you received, and the edited version. When you send the edited version, the recipient’s version and the version you received are no longer the same.

To maintain only one version of a received form package, use the Update Package command to replace the package you received with your edited version, before you send it to the next recipient.

➤To update a package

1. Open the package in your workspace.
2. Edit the package as required.
3. On the File menu, click **Update Package**.
4. Close the form, or send the package to the next recipient, as appropriate.

FormFlow replaces the package you originally received with the updated version. If you reopen the package, it contains the changes you made.

Forwarding Packages

A form sent via email may have a predetermined sequence of recipients. For example, your expense form might go from you to your manager for approval, to the accounting department for payment, then back to you for confirmation.

You can forward a package you have received if:

- the form has been sequentially routed
- you are not the last recipient on the routing list
- you have not already unpacked the form—that is, the form package still exists as a single .FPK file.

➤To forward a package

1. Open the package in your workspace.

2. Edit the package as required.

3. On the File menu, click **Forward Package**. The Send Form dialog appears, with the name of the recipients in the Recipients field. Your name appears with an asterisk (*) next to it. The name of the next recipient has an arrow to the left of it.

4. Click **OK** to send the form.

Returning Packages

A form may be designed to return to the person who originated it. For example, if your Human Resources department does a company survey, they would want all of the filled forms sent back to the same person. The form designer can design a form to do this automatically.

You can return a form package you have received to the originator if:

- the form was broadcast, or the form was sequentially routed and you are the last recipient on the routing list
- you have not already unpacked the form—that is, the form package still exists as a single .FPK file.

➤To return a package

1. Open the package in your workspace.

2. Edit the package as required.

3. On the File menu, click **Return Package**. The Send Form dialog appears, with the name of the recipient in the Recipients field.

4. Click **OK** to send the form.

Processing Workflow Tasks

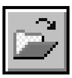
Sending forms can be as simple as filling a form, clicking the **Send Form** command on the File menu, and specifying a recipient. You may send forms on an ad hoc basis, or you may send the same forms to the same recipients frequently. You may have form applications that automate the process for you, so that you have only to click a single button to save form data, and send it on to a particular recipient.

FormFlow also supports more structured movement of forms from one person to another, known as *workflow*. Forms move in a pre-determined sequence of recipients, defined by the form designer using a *routing map*. Each recipient performs some *task* in the workflow.

For example, when you file an expense report, your task is to fill in the expense form. Your manager's task is to approve the form or send it back to you to modify, and your Accounts Payable department's task is to prepare your check and send the form back to you as confirmation.

Starting Workflow Tasks

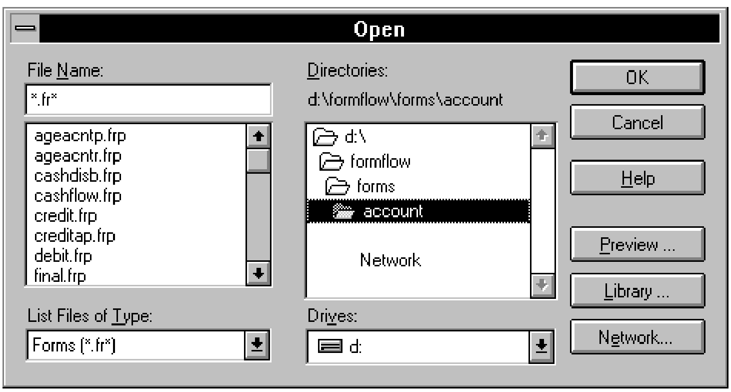
When you open the routing map (an .FRW file), you are starting a workflow and preparing to do the first task. Opening the .FRW file in turn opens a form, which you fill as you would any other form. When you complete the form, you route the form to the next recipient, which FormFlow usually determines automatically, based on the information in the routing map.



Quick keys: CTRL + O

➤To start a workflow task

1. On the File menu, click **Open**. The Open dialog appears.



2. If the file you want is on a different drive than the one displayed, click in the **Drives** box, then click the drive you want.

3. In the **Directories** box, double click the directory you want.

4. Click in the **List Files of Type** box, then click (*.frw, *.fwl).

5. Click the name of the file you want to open, then click **OK**.

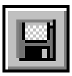
6. If you are not logged into your mail system, your mail system login dialog appears. Type the login information, then click **OK**. The form associated with the routing map appears in your workspace.

7. Fill the form as you normally would.

8. On the File menu, click **Save** to save the record.

Routing Forms

When you have completed your portion of a workflow task, you route the form to the next person who needs to see it. For example, once you fill your expense form, you need to route it to your manager for approval.



Quick keys: CTRL + U

➤To route a form

1. Save the record if you have not already done so. On the File menu, click **Save**.

2. On the File menu, click **Route Task**. One of the following happens:
   - If the workflow was designed to automatically determine the next recipient, FormFlow sends the form.

- If the workflow was designed to let you select the recipient, the Resolve Roles dialog appears.

Type a mail address here or click Address to select one.

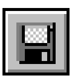
3. Do either of the following:
   - Type the name of the person to whom you want to send the form.
   - Click **Address**, then select a name from your mail system's address book. Click **OK** to return to the Resolve Role dialog.

4. If you will always be routing this form to the same person, enable **Don't show this dialog again**. FormFlow retains the name of the recipient. The next time you route this form, FormFlow will not prompt you for the recipient's name again.

5. Click **OK** to route the form.

Updating Tasks

If you are interrupted while filling a form and need to exit from FormFlow, you can the save the information you added or modified, and return to the task later.



Quick keys: CTRL + U

➤To update a task

1. Save the record if you have not already done so. On the File menu, click **Save**.

2. On the File menu, click **Update Task**. FormFlow saves the version of the form you were working on back to the Task List.

3. Close the form and exit FormFlow, as required.

The next time you open the form from the Task List, FormFlow will display your modified form instead of the one you originally received.

Checking Workflow Tasks

You can use your Task List to view the workflow tasks you:

- have started
- received and processed
- received but not yet looked at.

The Task List provides a list of all your workflow tasks, and their current stage of completion. For example, if you want to find out if your manager has processed your expense form, the Task List can tell you.

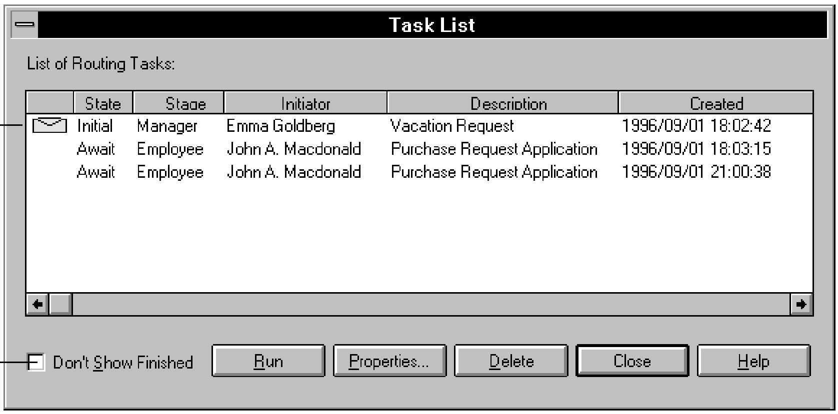
➤To check the status of your tasks

1. Log in to your mail system.

2. On the Tools menu, click **Task List**. The Task List dialog appears.

Click a task, then click Properties to get more information.

Enable this to filter out tasks you have completed.



The Task List dialog shows each stage of each workflow you have participated in. The Task List displays the current state of the task, the current stage, the name of the person who initiated the workflow, a description of the task, the date and time it was initiated, and the path and file name of the workflow file.

Tasks you have not yet viewed are indicated with an envelope icon in the left-most column.

3. By default, FormFlow sorts tasks by date and time. You might want to sort them alphabetically by initiator or description. To sort the task list in a different order, click a heading.

4. To see more information about a task, click it, then click **Properties**. The Task Properties dialog appears.

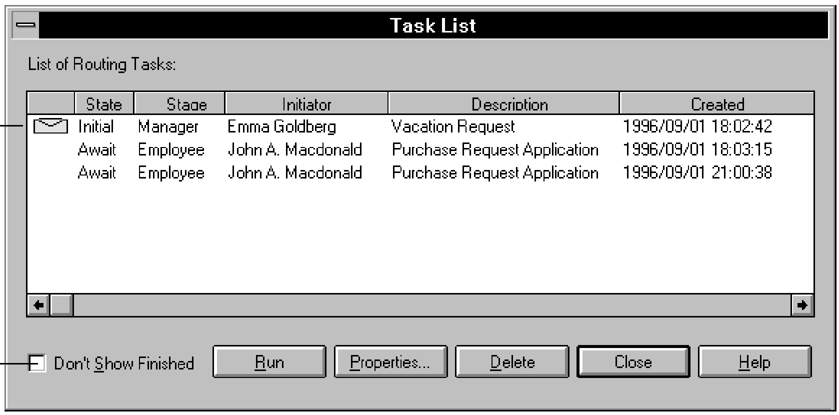
5. For each participant in the workflow who has initiated a task, there is a folder with information on that task. Double click a folder to open it.

6. Click **Close** to return to the Task List dialog.

➤To open a task

1. Log in to your mail system.

2. On the Tools menu, click **Task List**. The Task List dialog appears.



Click a task, then click Run to open the form.

Enable this to filter out tasks that you have completed.

3. Scroll through the list of tasks, then click the one you want.

4. Click **Run** to open the task and load the form.

5. Fill or modify the form, as required.

6. Save the record.

7. Route the task to the next recipient, or process the next task, as required.

7

Printing Forms

This chapter explains how to print forms from FormFlow™ Filler. It describes how to select a printer, and how to print forms in the following ways:

- on blank paper
- on pre-printed stationery
- to an output file.

Selecting a Printer

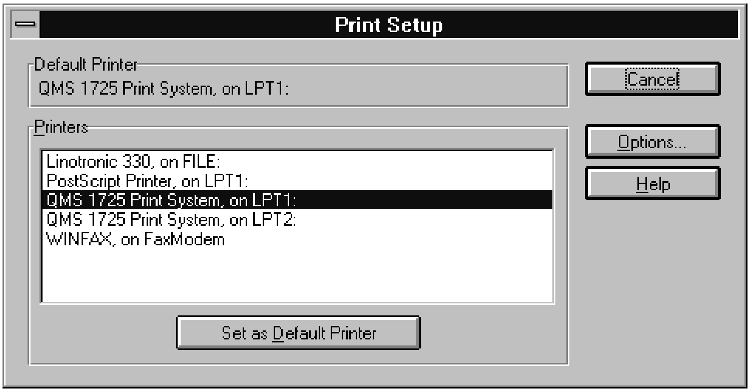
If you have more than one printer available to you, select the printer you want to use to print the form.

➤To select a printer

1. On the File menu, click **Print**. The Print dialog appears.

Quick keys: CTRL + P

2. Click **Printer**. The Print Setup dialog appears.



3. In the Printers section, double click the printer you want to use, or click the printer, then click **Set as Default Printer**. The currently selected printer appears in the Default Printer section at the top of the dialog.

4. To define printer-specific options, click **Options**. The dialog that appears varies with the printer you have selected. You may be able to change the settings for paper size, resolution, copies, memory, fonts, page orientation or font cartridges.

5. After defining options for your printer, click **OK** to return to the Print Setup dialog, then click **Close** to return to the Print dialog.

Note: Since each printer has different built-in fonts, changing your printer affects the fonts available to FormFlow. When you change your printer, some text on your form may look different.

Printing a Form

You can print a form in any of the following ways:

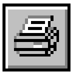
- print both the form and the associated data, typically on blank paper
- print data only, typically on pre-printed stationery
- print to an output file, then print the file from another workstation, even if that workstation does not have FormFlow installed.

➤To print a form

1. Open the form you want to print.

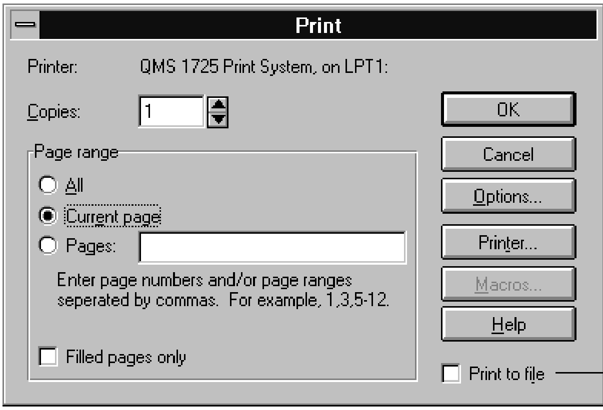
See “Selecting a Printer” on page 7-2.

2. If you have more than one printer, and the one you want is not currently the active printer, select the printer you want to use.



Quick key: CTRL + P

3. On the File menu, click **Print**. The Print dialog appears.



Enable this to print to a .PRN file

See “To change print options” on page 7-4.

4. To change your print options, click **Options** and make any necessary changes in the Print Options dialog.

5. In the **Copies** field, type the number of copies you want to print, up to 999 copies.

6. In the Page range section, do the following:
   - For multi-page forms, specify the range of pages you want to print.
   - To print only filled pages within the specified range, enable **Filled pages only**.

See “To print to a file” on page 7-5.

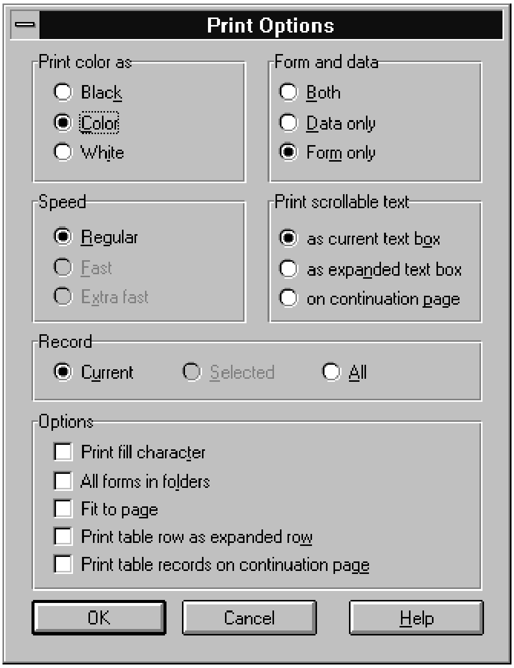
7. To print to an output file, rather than to a printer, enable **Print to file**, then specify a file name in the Print to File dialog.

8. Click **OK** to start printing.

➤To change print options

1. On the File menu, click **Print**. The Print dialog appears.

2. Click **Options**. The Print Options dialog appears.



3. In the Print color as section, click one of the following:
   - **Black** – to print colored text and objects as black.
   - **Color** – to print the form using the colors defined in your form. On black and white printers, colors are printed using corresponding shades of gray.
   - **White** – to print colored text and objects as white.

4. In the Speed section, click **Regular**. If you are using an HP LaserJet or compatible printer, you can also choose **Fast** or **Extra fast**.

5. In the Form and data section, enable one of the following:
   - **Both** – to print both the form and the associated data. Use this option when you are printing on blank paper.
   - **Data only** – to print the form data only. Use this option when you are printing on pre-printed stationery.
   - **Form only** – to print a blank copy of the form. Use this option when you are printing on blank paper, and want a sample, unfilled form.

6. In the Print scrollable text section, you control how FormFlow prints scrollable fields that contain too much text to fit in a single copy of the form. Enable one of the following:
   - **as current text box** – to print a text box as it appears on the screen, truncating any data that does not fit.
   - **as expanded text box** – to print a text box expanded to show all the data it contains.
   - **on continuation page** – to print data that does not fit in the current text box on a continuation page.

7. In the Record section, enable one of the following:
   - **Current** – to print only the current record.
   - **Selected** – to print the record(s) you have selected.
   - **All** – to print all records in the database attached to the form.

8. In the Options section, enable any combination of the following:
   - **Print fill character** – to print the symbols—such as asterisks or dots—used as guides to show where and how many characters to type in a field.
   - **All forms in folder** – to print all the forms in the current folder.
   - **Fit to page** – to scale a form to print on a different paper size than the one for which it was originally designed.
   - **Print table row as expanded row** – to print a table row expanded to show all the data it contains.
   - **Print table records on continuation pages** – to print table rows that do not fit on the current form on a continuation page.

➤To print to a file

1. On the File menu, click **Print**. The Print dialog appears.

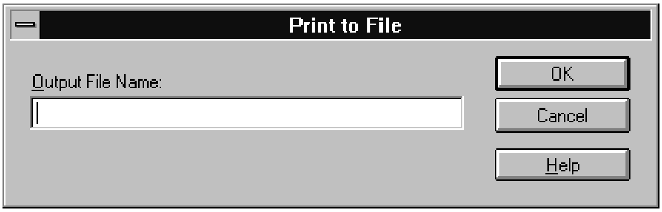
See “To change print options” on page 7-4.

2. To change your print options, click **Options** and make any necessary changes in the Print Options dialog.

3. In the **Copies** field, type the number of copies you want to print, up to 999 copies.

4. In the Page range section, do the following:
   - For multi-page forms, specify the range of pages you want to print.
   - To print only filled pages within the specified range, enable **Filled pages only**.

5. Enable **Print to file** and click **OK**. The Print To File dialog appears.



6. In the **Output file name** field, type a name for the output file, using the extension .PRN, then click **OK** to return to the Print dialog.

7. Click **OK** to start printing.

Index

S

T

U

V

W